

**Courtesy of Nerenberg & Kulawiak, Inc.**

*Phone: 973-347-3552*

**1. Personal Information**

Married or divorced in 2023? If divorced, bring copy of divorce decree

Change of dependents? Name, date of birth, SS#--Any in college, what year?

Change in address/phone number?

Your job title/Spouse's job title

Any changes coming in 2024?

Direct deposit your refund into the same account as last year?

If you have a new bank account, please include a voided check.

**Taxpayer & Spouse government id (passport, driver's license)**

**Do you have a financial interest or signature authority on a non-US bank or financial account? YES or NO**

**In 2023 did you receive or sell, exchange, gift, or dispose of a digital asset/cryptocurrency? YES or NO**

**Would you like a paper copy of your tax return for an additional \$5 fee? YES or NO**

If no, please provide an e-mail address for an invite to our SmartVault portal.

**2. Income**

All W-2's

Any 1099's:

-Interest and Dividends

-Unemployment (*NJ Unemployment 1099G is only on the unemployment website*)

-Pensions & Annuities

Sale of Property--Closing/Settlement statement plus dates of purchase & sale, purchase & sales price, cost of improvements

Social Security Benefits - Form 1099-SSA

Sale of Stock/Mutual Fund--Form 1099-B showing sales date and sales amount.

Lottery/Gambling Income and Losses

Other Income--Prizes & Awards, Alimony received

Rental Property Income & Expenses - HUD-1 from purchase/sale of property

Self Employed business income & expenses

**3. Deductions**

IRA Contributions including Roth IRA contributions

529 Plan Contributions: Include a year end statement. Many states now have a deduction or credit for contributions to a 529.

Alimony Paid--amount & social security number of recipient

Property Taxes Paid

Closing/Settlement Statement from closing of new house or re-finance

Home Mortgage Interest (Form 1098, not the escrow statement)

Contributions to charity - Need letter from organization & cancelled checks. Cash no longer allowed

Clothing/property donations - Must have itemized list detailing name & address of organization & donated value

Rent paid for apartment-Not deductible on federal return, but many states have a rent deduction

Student Loan Interest Paid - Form 1098-E

**NY & PA filers - Job Required expenses such as union dues, uniforms, etc. are still deductible.**

**(Over)**

#### 4. Credits

Child Care--Name, address, and tax id number of provider

Breakdown of amount paid for each child

Education expenses (Tuition, books, etc.)

Form 1098-T will be mailed or posted to the student's online account.

#### 5. Estimated Taxes Paid

	<u>Date Paid</u>	<u>Amount Paid</u>	<u>Check Number</u>
Federal 1st Qtr. (Due 04/18/2023)			
Federal 2nd Qtr. (Due 06/15/2023)			
Federal 3rd Qtr. (Due 09/15/2023)			
Federal 4th Qtr. (Due 01/16/2024)			
State 1st Qtr. (Due 04/18/2023)			
State 2nd Qtr. (Due 06/15/2023)			
State 3rd Qtr. (Due 09/15/2023)			
State 4th Qtr. (Due 01/16/2024)			

#### 6. Medical Expenses/Health Insurance

Health Insurance Paid - - Including COBRA but exclude pre-tax insurance from paycheck

Was everyone on the return covered by insurance all 12 months? If not, what months and who was not covered?

Prescriptions - - In January, your pharmacy will have a print out with the total for each member of your household.

Medical Expenses-- Doctor visits, glasses, contacts, chiropractors, dentists, hearing aides, & mileage

Long Term Care Insurance premiums paid - Separate amounts for taxpayer and spouse

#### 7. New for 2023! Residential Energy Saver Credit

Amount spent on New Energy Efficient Property. Each improvement is listed & calculated separately.

<b>Windows</b>	<b>Doors</b>	<b>A/C &amp; Furnace</b>	<b>Water heater</b>	<b>Insulation</b>
\$	\$	\$	\$	\$

#### 8. NJ Veterans Exemption

If you have not already completed the NJ Veterans form and submitted it to NJ along with your DD-214 you can obtain all of that online here: <https://www.state.nj.us/treasury/taxation/military/vetexemption.shtml>. Just notify us that you have submitted the paperwork to NJ prior to preparing your tax return.