

2023 WHAT TO BRING TO YOUR TAX APPOINTMENT

Current Picture I.D. (driver's license, passport, state issued identification card) **For 2023 even if we have known you for years!**

Social Security Card (you **must** bring either an original card, a copy of the card or a copy of last year's tax return) for yourself and all family members you are claiming, or ITIN's **unless they are already on file.**

Dates of birth for yourself and all family members you are claiming.

If you are a **new** client, please bring copies of the last 3 years tax returns.

Copies of dependent children's current year tax returns if they have filed before you file.

W-2s for **all** jobs you held in 2023 and any other tax related documents.

Form 1099-G, if you received unemployment insurance in 2023

Form 1099-INT, if you received interest from a bank account in 2023

Form 1099-DIV. if you received and dividends

All Forms 1099-B for stock and investment sales

The letter, or at least the amount, of any stimulus payment you may have received.

The letter, or at least the amount of any Advance Child Tax Credit payments received.

Form 1099-Misc

Any information pertaining to Crypto Currency transactions.

Any information pertaining to foreign accounts if you access, ownership, signing authority, highest balance during the year, etc.

Form 1098-T for tuition and fees. **Also bring in the receipts for this and for books purchased.**

If you are claiming childcare expenses, documentation of expenses and childcare agency's ID or Social Security number of provider.

If you have rental income please provide the **number of days** each property was in rental use **and complete the rental worksheets.**

Please bring the receipts for supply and repair items that are in excess of \$2500 that pertain to your business or rental expenses.

If claiming **Earned Income Tax Credit, Child Tax Credit or the College Credits** **please provide evidence of child residing at your address. See list below examples of documents you will need to provide. For 2023....proof is required for all 3 credits.**

Head of household filing status will also be required to complete a section on Form 8867, so please see the list below of examples of documents that you may need to provide in order to claim this filing status.

A voided check or deposit slip for direct deposit of your refund.

Under the Client Forms tab of our website (www.taxsolution.guru) please complete the following items to expedite your visit:

Worksheets for Self-Employment, Farm & Ranch, Rental Income, and Auto Expenses

Signed Copy of 2023 Income Tax Return Annual Engagement Agreement

Business Engagement Letter Addendum (For Self Employment, Farm & Ranch & Rentals)

Consent to Use Tax Information.

Consent to Disclose Tax Information if you want us to discuss your information with **ANY** third party. (This includes having a relative pick up your tax return.)

If claiming auto expenses complete the Car & Truck Worksheet and the Confirmation of Written Records for Auto Usage.

Documentation List:

The following are examples of documents that we may rely on to determine a taxpayer's eligibility to claim the credit(s), and/or HOH filing status and the amount(s) of any credit(s) claimed. This list is not all-inclusive and none of these documents are specifically required to demonstrate eligibility for the credits and/or HOH filing status. We are required to keep copies of these for 3 years, so please provide actual documents to be copied.

Residency of a Qualifying Child

- School records or statement from school
- Landlord or a property management statement.
- Health care provider statement.
- Medical record showing child's name, your address and dated in 2023
- Childcare provider records.
- Placement agency statement.
- Social service records or statement. (Medicaid/Chip)
- Place of worship statement.
- Indian tribal official statement.

Disability of Qualifying Child

- Statement from medical doctor.
- Statement from other health care provider.
- Statement of social services agency or program statement.

Schedule C – Self Employment

- Business license.
- Forms 1099.
- Records of gross receipts provided by taxpayer.
- Taxpayer's summary of income or summary of income provided by taxpayer, Form 1099-Misc
- Records of expenses provided by taxpayer.
- Taxpayer's summary of expenses or summary of expenses provided by taxpayer.
- Bank statements to show income and expenses.

Head of Household

You must meet all three:

1. Taxpayer was unmarried or considered unmarried
2. Taxpayer provided more than half of the cost of keeping up a home for the year for a qualifying person
3. A qualifying person lived with you in the home for more than half the year (except for temporary absences, such as school). However, if the qualifying person is your dependent parent, he or she doesn't have to live with you.

See the worksheet below to help determine if you provided more than half of the cost of keeping up a home.

Worksheet 1. Cost of Keeping Up A Home

	Amount You Paid	Total Cost
Property taxes	\$	\$
Mortgage Interest Expense	\$	\$
Rent	\$	\$
Utilities	\$	\$
Repairs/Maintenance	\$	\$
Property Insurance	\$	\$
Food eaten in the home	\$	\$
Other household expenses	\$	\$
Totals	\$_____	\$_____
Minus total amount you paid		(_____)
Amount others paid		\$_____