



## 2023 Personal Income Tax Checklist

### Personal Information and Income

- You, Your Spouse and Your Dependents**  
Last year's return, full legal name, date of birth, Social Security number, driver's license number, issue, and expiration dates.
- Personal Earnings Statements**  
Form W-2's (for you and your spouse) and all 1099 forms
- State and Local Tax Refunds and Unemployment Income**  
1099-G forms
- HSA and Long-Term Care Reimbursements**  
1099-LTC (distribution document)
- Interest and Investment Income**  
Form 1099-INT, 1099-DIV, 1099-B and Schedule K-1
- IRA's, Pensions and Annuities**  
1099-R forms
- Social Security and RRB Income**  
SSA-1099 and RRB-1099
- Trust and Estate Beneficiary Earnings**  
Form 1041, Schedule K-1
- Home or Property Sale**  
Form 1099-S

### Personal Deduction

Collect supporting documentation for any of the following expenses that apply to you.

- Charitable Contributions and Donations**  
Detailed list of contributions, receipts for donations, and Form 1098-C for vehicle donations or a letter of confirmation from the qualified charity.
- Homeowner Expenses**  
Form 1098 mortgage interest statements, property tax payment receipts, and receipts for qualified energy efficiency upgrades (certification if provided by the vendor).
- Child and Dependent Care Expenses**  
Name, address and Tax ID number or Social Security number of the care provider. The amount paid for care during the tax year.
- Health Care Expenses**  
1095 Forms (for health care coverage) and all records of medical, dental and vision costs for the tax year.
- Education Expenses**  
Itemized receipts for qualified educational expenses, tuition statements (Form 1098-T), student loan interest statements (Form 1098-E).
- Job-Related Educational Expenses**  
Detailed records of the expenses
- IRA Contributions**  
Form 5498
- Health Savings Account Contributions**  
Form 5498-SA