Tax Prep Documents Checklist for 2022 Tax Returns

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Personal Information

_____ Last year's tax return, ***if you are a new client***.

_____ Name, address, SSN and DOB for yourself, spouse, and dependents, ***if not on file with us***.

_____ Banking Information, ***if Direct Deposit Refund/Payment AND different from last year***.

_____ Proof of Health Insurance, 1099-HC or 1095-A ***(Nothing Needed for Medicare)***

Income Data (where applicable)

_____ Wages, salaries, tips, etc. (W-2)

_____ Interest and/or Dividend Income (1099-INT/DIV)

_____ IRA, Pension & Annuity Distributions (1099-R)

_____ Lump Sum Retirement Distr/Rollover (1099-R)

_____ Social Security Benefit Statement (SSA-1099)

_____ Home Sold/Bought (Settlement Stmt/1099-S)

_____ Prior year installment sale info (Form 6252)

_____ Stock or Bond Activity (1099-B)

_____ Convertible Virtual Currency Transactions

_____ State/Local Refund/Credit/Offset (1099-G)

_____ Alimony Received (& Agreement Date)

_____ Other Income (1099-MISC)

_____ Small Business Income (Schedule C) (1099-NEC)

_____ Electronic Transactions (1099-K)

_____ Rental Income (Schedule E)

_____ Farm Income (Schedule F)

_____ Unemployment Compensation (1099-G)

_____ Gambling/Lottery Wins & Losses/ Prizes (W-2G)

_____ Cancellation of Debt (1099-C)

_____ Foreign Income

_____ Partnership/S-Corp/Trust Estate Income (K-1's)

_____ All other income: Jury Duty, Barter, etc. . .

Expense Data (where applicable)

_____ Educator Expenses

_____ HSA Contrib (5498-SA)/Distributions (1099-SA)

_____ Self-employed SEP, SIMPLE & qualified plans

_____ Self-employed Heath Insurance costs

_____ Alimony Paid (Recipient's SSN & Agreement Dt)

_____ Student Loan Interest (Form 1098-E)

_____ Tuition Costs/Books & Supplies (1098-T)

_____ Dependent Care Costs (& Provider Name, Address, Tax ID/SSN ***if different from last year***)

_____ Roth/Traditional IRA Contributions

_____ Solar Energy Equipment & Labor Costs

_____ Estimated Tax Payments to Federal or State Government and Dates Paid

Schedule A Deductible Expenses for People Itemizing

_____ Medical/Dental Expenses

_____ State/Local Income Taxes or General Sales Taxes

_____ Real Estate Taxes

_____ MA Vehicle Excise Tax or NH Local Municipal Portion of Vehicle Registration Fee

_____ Paid Sales Tax on large purchase: vehicle/boat

_____ Mortgage/Home Equity Loan Interest (1098)

_____ Charitable Contributions Cash/Non-Cash

_____ Uninsured casualty and theft losses from federally declared disaster

Expense Data (unique to Massachusetts)

_____ 529 College Savings Plan Contributions

_____ MA rent Paid with Name & Address of Landlord

_____ MA Commuter Rail and/or Fast Pass Tolls

_____ **If over 65 year of age**, MA Primary Residence Water/Sewer Bills & Real Estate Tax Bills