



## 2023 Individual Tax Return Checklist

**CLIENT INFORMATION:** New clients, fill out completely. Returning clients, fill out for changes.

Client Name: _____	Spouse Name: _____
Client SSN: _____	Spouse SSN: _____
Client Date of Birth: _____	Spouse Date of Birth: _____
Address: _____	Phone Number(s): _____
Email: _____	_____

**DEPENDENT INFORMATION:**

Dependent #1 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____
Dependent #2 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____
Dependent # 3 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____

**BANKING INFORMATION FOR DIRECT DEPOSIT & DIRECT DEBIT:**

Bank Name: _____	Account Number: _____
Routing Number: _____	Returning Clients, same banking info. as last year?    Y    N

**INCOME:**

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-MISCs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> 1099-Rs	<input type="checkbox"/> 1099-Gs (Unemployment, Etc.)
<input type="checkbox"/> W-2Gs	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> 1099-SSAs	<input type="checkbox"/> 1099-NECs	<input type="checkbox"/> 5498-SA (HSA Contributions)
<input type="checkbox"/> K-1s	<input type="checkbox"/> 1099-B Stock/Property Sales	<input type="checkbox"/> Foreign Income	<input type="checkbox"/> 1099-Ks	<input type="checkbox"/> 1099-SA (HSA Distributions)
<input type="checkbox"/> Income from Rental Property	<input type="checkbox"/> Virtual Currency	<input type="checkbox"/> 1099-Gs	<input type="checkbox"/> Small Business/Hobby Income	
<input type="checkbox"/> Crypto Currency Transactions (gaine & losses)	<input type="checkbox"/> Child Support Received			

**EXPENSES & DEDUCTIONS:**

<input type="checkbox"/> 5498 IRA Contributions	<input type="checkbox"/> Energy-efficient Home Improvements	<input type="checkbox"/> Medical Expenses (7.5% of AGI for 2023)
<input type="checkbox"/> Mortgage Interest (1098)	<input type="checkbox"/> Electric Vehicle Purchases	<input type="checkbox"/> Insurance Premiums
<input type="checkbox"/> Property Tax Statements	<input type="checkbox"/> License & Registration Fees	<input type="checkbox"/> Charitable Contributions
<input type="checkbox"/> 2022 Taxable Value of Home	<input type="checkbox"/> Educator Expenses	<input type="checkbox"/> Childcare Expenses & Provider Information
<input type="checkbox"/> Estimated Taxes Paid for 2023	<input type="checkbox"/> Expenses Related to Rental Property	<input type="checkbox"/> Sales Tax for Major Purchases
<input type="checkbox"/> 1098-T & Tuition Expenses	<input type="checkbox"/> Office in Home Information (Sq. feet of office space & total sq. ft. of home)	

**MISCELLANEOUS INFORMATION:**

- Identity Protection PIN
- # of Days Worked from Home if you LIVE or WORK in a taxable city (Grand Rapids, Walker, East Lansing, Detroit, etc.)
- Required 1095-A if you had Marketplace Health Insurance in 2023
- Record of Home Sale if applicable in 2023
- Copy of Valid Drivers License or State ID
- Copy of previous year's tax return if VDTA did not prepare it

If you have questions, please visit our website, send us an email, or give us a call!  
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\*This list intended to be an outline, not an all inclusive list. Additional information may be needed for some clients to complete their tax return.