What do I need to bring to my tax appointment?

My Check List:

Personal Information:

□ Your social security number

□ Your spouse's full name & social security number

□ Your Drivers License Copy (And Spouse if applicable)

□ Amount of any alimony paid and ex-spouse's social security number

□ Your 2020 and 2021 tax return(s). Your tax professional can check them for accuracy. (Not needed if Gundersons Bookkeeping prepared them).

□ Client Agreement signed by you and spouse.

□ Completed Tax organizer (short form)

Employee Information:

□ W-2 Forms

Healthcare information:

□ HSA for 5498 -SA

□ 1095-A for marketplace

Other People who may belong on your return:

□ Dates of birth and social security numbers

□ Childcare records (including the provider's ID number) if applicable

□ Approximate income of other adults in your home (not spouse, if you're filing jointly)

□ Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you.

IRA Information:

□ Amount contributed for 2022

□ Traditional IRA basis

□ Value of IRAs on Dec 31, 2022

Rental Income:

□ Records of income and expenses

□ Rental asset information (cost, date placed in service, etc.) for depreciation

Other Income:

□ Unemployment, state tax refund (1099-G)

□ Gambling income (W-2G or records showing income, as well as expense records)

□ Amount of any alimony received and ex-spouse's name

□ Health care reimbursements (1099-SA or 1099-LTC)

□ Jury duty records

□ Hobby income

□ Prizes and awards

□ Other 1099

Education Payments:

□ Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid

□ Forms 1098-T and 1098-E, if you received them

□ Scholarships and fellowships

Savings and Investments:

□ Interest dividend income (1099-INT, 1099-OID, 1099-DIV)

□ Income from sales of stock or other property (1099-B, 1099-S)

□ Dates of acquisition and records of your cost or other basis in property you sold

Itemizing Deductions:

□ Form 1098 or other mortgage statements

□ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid

□ Real estate and personal property tax records

□ Invoice showing amount of vehicle sales tax paid

□ HUD statement showing closing date of home purchase

□ Cash receipts donated to houses of worship, schools, and other charitable organizations

□ Records of non-cash charitable donations – ***must be itemized with amounts***

□ Amounts paid for healthcare insurance to doctors, dentists, hospitals

□ Amounts of miles driven for charitable or medical purposes

Vehicle Information:

□ Total miles driven for the year (or beginning/ending odometer readings)

□ Total business miles driven for the year (other than commuting)

□ Amount of parking and tolls paid

□ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Self-Employment Information:

□ Form 1099-Misc, Form 1099-NEC, Schedules K-1, income records to verify amounts not reported on 1099's

□ Records of all expenses – check registers or credit card statements, and receipts

□ Business-use asset information (cost, date placed in service, etc.) for depreciation

□ Balance sheet and profit & loss statements for the year

Retirement Income

□ Pension/IRA/annuity income (1099-R)

□ Social security/RRB income (1099-SSA, RRB-1099)

Other

□ Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"

□ Estimated tax payments made during the year to the IRS, amount paid in, and dates.

□ Records of any transactions involving cryptocurrency. Form 1099-B.