



PERSONAL INCOME TAX ◆ 2023 CHECKLIST ◆

This is a checklist of items that may be used in preparing your personal income tax return. Please bring any official documents that apply to you. For all other income and expenses please bring totals only. If a line item applies to you and has "REQUIRED" listed – then additional info must be provided. You can complete our client info forms online @normastax.com or in the office.

Personal information to verify

- Social Security numbers and dates of birth for any new dependents
- IP PIN letter issued annually from IRS (for compromised or stolen identity)
- Proof of dependent's residency.** Must have 2023 date, dependent name and your address for all dependents.
Examples: 1095A, B or C, grade card or school record, medical records, MO Medicaid, or bank statement

Information about your income

- W-2 forms for you (and your spouse)
- 1099 NEC (Non-Employee Compensation)
- 1099 SSA for Social Security benefits received
- 1099 INT, -DIV, -B, or K-1s for investment or interest income
- 1099 HSA – Health Savings Account distributions
- 1099A or 1099-C for any debts cancelled or property abandoned
- 1099B - Sales of Investments, Block chains for virtual currency exchanges or virtual currency profit reports
- 1099G - forms for unemployment income, or state or local tax refunds
- 1099K - income received from Venmo, Square, credit cards or other cash apps
- 1099Q - 529 education plan distributions
- 1099R - Retirement/Pension income
- 1099S forms for income from sale of a property
- K-1's from Partnerships, S-Corporations, Trusts or Estates
- Alimony received and date of divorce OR date of modification
- Miscellaneous: jury duty, gambling winnings, scholarships, etc.
- Self-Employment, Rental or Farm Income (totals of income and expenses by category)

Deductions and credits

The following items may help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe:

- Form 1095A - Affordable Care Act -REQUIRED if you had healthcare.gov or marketplace health insurance
- Form 1095B - 1095C (not required but helpful for dependency verification)
- Form 1098E - Student loan interest paid (or loan statements for student loans)
- Form 1098T - Tuition paid - this form is REQUIRED for tuition credit
- Forms 1098 - Mortgage interest, private mortgage insurance (PMI) on main or 2nd homes (if itemizing)
- For teachers: totals for expenses paid for classroom supplies, PPE, etc. (max deduction is \$300)
- Records of IRA contributions made for 2023
- Records of Medical/Health Savings Account (MSA/HSA) contributions not reported on W-2
- Out of Pocket Health insurance premium totals (do not include employee premiums)
- Alimony paid and date of divorce OR date of modification
- Child care costs - provider's name, address, tax ID, and amount paid
- Adoption costs - SSN of child; totals and records of legal, medical and transportation costs
- Qualified charitable donation receipts with amounts or value of donated property & mileage (if itemizing)
- Qualified Charitable Donation through your IRA – if over age 72
- Medical & dental expense totals; amount paid out of pocket for health insurance, mileage (if itemizing)

Taxes you've paid

- Federal and state estimated tax pre-payment amounts and dates paid
- Real estate and/or personal property tax paid receipt (if itemizing or PTC)

Brought to you courtesy of:

Norma's Tax Service
619 NW R.D. Mize Road
Blue Springs, MO 64014
Phone: 816-229-2992 Fax: 816-229-3280