

# T.A.X.E.S.

Tax & Accounting eXtra Easy Solutions

34 S Marvin Lane PO Box 1107 Waynesville OH 45068 513-897-1040

Name \_\_\_\_\_ Date \_\_\_\_\_

Phone number: \_\_\_\_\_ e-mail: \_\_\_\_\_

| YES | NO | GENERAL QUESTIONS  |
|-----|----|--|
|     |    | Did / Do you receive, sell, exchange, or dispose of a digital asset? (i.e., NFTs, BitCoin, Coinbase, Crypto, etc.)?  |
|     |    | Did / Do you have any Foreign bank accounts and/or investments?  |
|     |    | Did you purchase and install energy-efficient items? (car, windows, furnace, etc.)   |
|     |    | Did you do any Online / Sports Gambling?   |
|     |    | 1099-K ( i.e. PayPal, Venmo, Zelle etc.) <a href="#">Did you receive this form?</a>  |
|     |    |  |
|     |    | <b>OTHER INDIVIDUALS IN YOUR HOUSEHOLD or ON YOUR TAX RETURN:</b>  |
|     |    | Provide proof they lived with you in 2023 (report cards, medical records, daycare expense). If "new", please provide SS Card and Birth Certificate   |
|     |    | Names & Ages:  |
|     |    |  |
|     |    | <b>TAX INFORMATION / FORMS CHECKLIST</b>   |
|     |    | Identity Protection Pin letter from IRS  |
|     |    | W2's for wages, salary, sick leave from EACH employer  |
|     |    | 1099-R for Retirement, Pensions, Annuities, and / or IRAs  |
|     |    | SSA-1099 for Social Security, Disability or Railroad Retirement Benefits   |
|     |    | 1099-INT Interest from Checking/Savings Accounts, Bonds, CDs, Brokerage.   |
|     |    | 1099-DIV Dividends from Stocks, Mutual Funds, Brokerage  |
|     |    | 1099-B Proceeds from sale of stocks, bonds, or other investments   |
|     |    | Brokerage Statement(s) 1099s (DIV, INT, B, R, & more)  |
|     |    | 1099-G for Unemployment compensation and/or State/local refund   |
|     |    | 1099-NEC Non-Employee Compensation   |
|     |    | 1099-MISC Rental income, Royalties, other income   |
|     |    | Sch K-1 from Partnership, Estate, Trust, S-Corps   |
|     |    | 1099-SA Health Saving Account distributions  |
|     |    | 5498-SA Health Saving Account contributions  |
|     |    | 1098-T College or post-Secondary education expenses and scholarships <a href="#">DOWNLOAD</a>  |
|     |    | 1098-E Student Loan interest   |
|     |    | 1095-A Health Insurance via ACA Marketplace / Exchange / ObamaCare   |
|     |    | 1098 Mortgage interest paid  |
|     |    | <b>OTHER INCOME</b>  |
|     |    | Other INCOME (Alimony received, Gambling, Lottery, prizes, Awards, jury duty, foreign income, sale of house, UBER / LIFT, Fantasy sport league, cancelled debt, etc.)<br><a href="#">Specify</a> |

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Phone number: \_\_\_\_\_ e-mail: \_\_\_\_\_

| YES | NO | BUSINESS INFORMATION CHECKLIST   |
|-----|----|--|
|     |    | Business (Self-employment) Income, Expenses, New Assets/purchases. Trade-ins   |
|     |    | Rental property Income, Expenses, new assets / purchases, Sold property  |
|     |    | Farm Income, Expenses, New Assets, trade-ins   |
|     |    |  |
|     |    | <b>WAYS WE CAN REDUCE TAXES / INCREASE REFUNDS</b>   |
|     |    | Daycare expenses for child(ren) or other dependent(s).   |
|     |    | Educator supplies (K-12) Amount \$ _____   |
|     |    | Contributions to retirement Account OTHER THAN through Work? Which?<br>_____ IRA _____ 401K _____ Roth IRA _____ Other             |
|     |    | Alimony Paid   |
|     |    | Medical & Dental expenses – Doctor, Dentist, Hospital, Nursing Home, Labs, RX,<br>eyeglasses, hearing aids, etc. _____ Miles _____ |
|     |    | Health Insurance Premiums (other than thru Work/payroll and SS withholding)  |
|     |    | Long Term Care Premiums  |
|     |    | Charity Contributions as CASH _____<br>as ITEMS _____ Miles _____  |
|     |    | Taxes paid (State, Real Estate, Personal Property, Sales)  |
|     |    | Estimated tax payments? Who _____ How much \$ _____  |
|     |    | 529 Contributions? Who _____ How much \$ _____   |
|     |    | Did you home school?   |
|     |    | Did you work from home (instead of the office)?  |
|     |    |  |
|     |    | <b>LIFE EVENTS</b>   |
|     |    | Gift more than \$17,000 (cash or fair market value) to another person  |
|     |    | Inherit an IRA, Annuity, real estate, other?   |
|     |    | Did you move or change your mailing address?   |
|     |    | Do you have a different phone number or e-mail address?  |
|     |    | Did your marital status change (married, divorced, widowed)?   |
|     |    | Do we have current copies of your (& spouse) driver's license(s)?  |
|     |    | Do we have current copies of voided check for refund Direct Deposit?   |
|     |    | Is there someone you would like us to contact if you are unable to make decisions about<br>your tax returns? <b>E-mail</b> _____   |
|     |    | <b>Name</b> _____ <b>Phone</b> _____   |
|     |    | <b>Signature:</b> _____ <b>Date</b> _____  |