



JENNIFER EATON
CPA, PC

Checklist for Your Tax Preparation

Documents you need to bring us.



NOTICE TO BUSINESS OWNERS:

Please know it is important that you inform us of any large purchases or significant financial transactions that occurred during Tax Year 2023, since these transactions may have an impact on your tax situation.

Please remember the sharing of information between a client and their accountant and financial/banking advisor is important as these individuals all work together to assist a client with financial and tax planning.

- ✓ **Client and Tax Information - Tax Year 2023 (our form):**
 - Download this form from our web site, complete it, and bring it in with your tax documents. This form ensures we have your current information, which may affect your tax preparation. This form can be found on our web site (www.eaton-cpa.com) by clicking on the "Forms: Our Office" link at the top of the web page. We mailed this form to our clients along with our newsletter in early January.
- ✓ **Income:**
 - **W-2 Forms**
 - **1099 Forms:** **-K** from third party payors; **-NEC** for non-employee compensation (self-employed); **-MISC** for miscellaneous payments. Please bring us all 1099 forms that you received so we can review them.
- ✓ **Other Income and Losses:**
 - Gambling, prizes, royalty, and alimony paid / received.
- ✓ **1099-R forms (retirement):**
 - Pension / IRA / Annuity
- ✓ **Savings and Investment / Dividend Information:**
 - Interest / Dividend Income
 - Income – Sale of Stock
 - Cryptocurrency: If you own / have owned cryptocurrency, we need to know. If you sold cryptocurrency, that results in a taxable event and it is treated the same as if you sold a stock. That means it needs to be reported as either a capital gain or a loss on your tax return.
 - Income – Other Property
 - Health Savings Account (HSA)
- ✓ **Estimated Tax Payments Made for Tax Year 2023** – Bring us these records.
- ✓ **Charitable Donations** – Bring us your receipts or the notation amount.
- ✓ **Health Insurance - Form 1095-A:**

You will receive this form if you are or had been enrolled in (*for any period of time during Tax Year 2023*) an insurance plan through the Health Insurance Marketplace (a.k.a. "The Exchange"), where individuals purchase a health insurance policy on their own.
- ✓ **Education:**

Form 1098-E shows interest; 1098-T shows tuition/other expenses.
- ✓ **Teachers – classroom expenses:**

Educators in grades K-12 qualify for a deduction up to \$300.