



2023 Tax Season Check List

New Items

- Did you buy an Electric Vehicle? If so, bring the sales receipt including VIN Number.
- Energy Efficient items such as: insulation, heaters, doors, windows? Let us know if you did this in the year 2023 even if you claimed the credit in the past.
- Purchased Solar Panels Cost and verification of cost by receipt. This is for PURCHASED panels not leased.

Earned Income

- W2's from All jobs
- 1099 Misc.
- 1099 NEC (New Form for Subcontractors)

Unemployment Income

- Form 1099-G from Unemployment (**VERY IMPORTANT**) – Electronic Statements Print it!
- Log into The Unemployment website and print your forms (they will not be mailed to you unless you contact the DUA and request it)

Social Security Benefits

- Form SSA-1099

Miscellaneous Income

- Form(s) W-2G for gambling and lottery winnings (you get this at the time you get the money)
- Alimony / Divorce Decree (Need the date of Divorce)
- Form 1099-MISC for prizes and awards
- Cancellation of Debt (Form 1099C)

Investment Income

- Interest income - Form 1099-INT
- Savings Bond Interest
- Dividend income - Form 1099-DIV
- Proceeds from the sale of stocks, bonds, etc. - Form 1099-B **COST BASIS IS REQUIRED**
- Schedule(s) K-1 (Form 1065 or 1120S) from investments in partnerships or S- Corps
- Income from stock option exercises and sales
- Crypto Currency – Did you sell (1099-B)? Did you purchase it?
- Robinhood Account (even if it is a small amount)



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Income from State & Local Income Tax Refunds

- Form 1099-G from state (I will have this information if you were here last year)

Business Income (Sole Proprietor) Schedule C

You need to add up your own receipts per category.

- Books/accounting records for your business
- Form 1099K issued from your Credit Card Machine Company
- Total Income: _____
- Detailed List of Expenses (with a total)
- Bank statements (if needed for back up)
- Cancelled checks for expenses.
- Payroll records

IRA/Pension Distributions

- Form 1099-R from IRA or retirement plans
- IRA early withdrawal and explanation
- Contributions made to your IRA/SEP/SIMPLE/Roth
- Beginning and Ending Balance of IRA Accounts for 2023 **** Vital if you are retired and collecting your IRA****

Rental Property Income

- Total Income Received
- **Detailed List of Expenses paid (total the categories)**
- Form 1099-Misc for rental income paid to you.
- Mortgage interest reported on Form 1098
- Property tax payments from assessor's bill or cancelled checks.

Income from Sales of Property (not primary residence) If the property was sold in 2023.

- Sales proceeds – Settlement Sheet for purchase and sale or bring in closing package from Lawyer.
- Cost of the property you sold - Improvements made to the property - Invoices or construction contracts and cancelled checks.



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Paperwork that you need to bring to your appointment.

- **Bring in IDENTITY THEFT PROTECTION PIN if you received it from the IRS.**
- If you are having custody issues, please have the other parent sign Form 8332 to release claim of the child. Also, bring in your divorce decree stating you can claim the child.
- Form 1095-A Health Insurance Marketplace is especially important, please remember to bring with you. Did you get any financial assistance in paying for your health insurance? (Also, called the Marketplace, bring in that paperwork it will come in a bright color envelope)
- Did you PURCHASE Solar Panels? Bring Paperwork showing that you purchased the panels did not lease them.
- You can now pay the IRS through Direct Pay. www.officialpayments.com and Mass DOR [https://mtc.dor.state.ma.us/mtc/ /](https://mtc.dor.state.ma.us/mtc/) Estimated payments, Balanced Due etc....
- Save your BANK STATEMENTS and Credit Card Statements – Print them if they are online! You **do not** need to bring them but need to have them for 2019, 2020, 2021, 2022 and 2023!
- If you are new to the firm this year, please bring in a copy of the prior year's taxes.

2023 Deductions...

If you have expenses, you must be able to PROVE IT! SAVE YOUR RECIEPTS

The Internal Revenue Service will let you pay less tax if you do more work in preparing for your taxes...

Childcare Costs – Bring Tax ID Number

Ask the Childcare Provider for their Tax ID Number. If it is a sport and you attend the games, it is not considered childcare.

- **Provider's tax ID number**
- Amount Paid \$
- Childcare provider's name and address



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Medical & Dental Expenses

Did you pay over 7.5% of your income to medical bills not including your pre-tax Health Insurance Premiums?

- Medical bills that you paid (Dentist, Eyes, Prescriptions, Co-Pays, Braces, Cobra Ins. etc....)
- Form SSA-1099 for Medicare premiums paid from your social security benefits.
- Mileage records for trips to the doctor, clinics, etc.

Health Insurance

- Form 1099-HC and a copy of your health insurance card (need your member number)
- **Form 1095-A (This comes in a bright colored envelope)**

Taxes

- Real Estate Taxes Paid
- Excise Taxes Paid
- Car Registration Paid
- Municipalities/Local Taxes Paid
- State Taxes paid in previous year.

Home Mortgage Interest

- Username and Password if you pay it online.
- Form 1098, or your year-end mortgage statement showing your yearend totals.
- Do not forget the Interest from the old and new mortgage companies if you refinanced or were sold to another company!
- If you are set up for electronic statements print out the Year End Statement.
- Points Paid in 2023
- Bring in the settlement sheet if you purchased or refinanced your home.

Charitable Donations

Cash donations:

- Charity receipts or cancelled checks.

Donations of Property:

- Receipts from charitable agency
- Color of the drop off bin you used.
- Estimated value of property given



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Education Costs (Form 1098T)

Student's username and password to their college portal to get their 1098T if not mailed to you.

- College Education Payments
- Student Loan Interest Paid
- Computer, Books, School Supplies

Job Expenses

- **Job Expenses are not allowed to be deducted this year!**

Tax Payments

- Quarterly estimated tax payments - Records showing the date paid and amount.
- If you applied a tax overpayment from 2022

Leah's Office Policy and Procedures:

Now on to a very delicate matter, **payment is expected and required at the time of the appointment.** Billing is not an option. The tax return will not be released from our office or e-filed until we receive payment. **Fees will be slightly increasing this year.** However, **we are charging to do Tax Returns for anyone that is not your dependent on your personal taxes.**

S. J. & J. Inc. will accept Debit Cards, Credit Cards, Checks and Cash at the time of your appointment.

If you run late my office cannot guarantee that we can complete your taxes during your allotted time because it could conflict with another appointment.

Tax returns for children that are no longer your dependents. (Full Time College students are still your dependents). It is time for them to take responsibility for themselves. They should make their own tax appointment and pay the tax preparation fee. There are no exceptions.

Nenita, Greg, Linda, Katia and Kelsey will all be returning this year.

Tax Season Hours are Monday – Friday 9am to 8:30pm. Saturday 9am – 2pm or 3pm depending on the Saturday) and Sunday (every other) 12pm – 5pm. (Non-Tax Season Monday – Thursday 9:30am – 5pm)

All we ask is that you use this paperwork to be prepared, and you can always ask me questions.

Thank you for your loyalty and continued business!

Leah B. Greenberg

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