

James R. Kist, CPA, P.A.

2023 Things to Bring List

Be sure to Bring All of the Following with You:

1. Copies of W-2
2. 1099 forms reporting all:
 - Interest & Dividends from Savings Accounts, Money Markets, Mutual Funds, Stocks, Bonds, Etc.
 - Non-Employee Compensation
 - Unemployment Compensation (*Insurance*)
3. 1099 forms reporting all Stock sales for 2023 as well as original purchase date and cost information
4. 1099 forms for all Retirement Fund transfers and Social Security benefits
5. Social Security numbers and dates of birth of all dependents (*if not previously supplied*)
6. Copies of all K-1's (*Partnership and S Corporation*)
7. Schedule summarizing business or rental income and expenses if applicable
8. Date and amount of each estimated tax payment
9. Name, address, I.D. or Social Security number of all child care providers and amounts paid for each child care provider
10. Itemized Deductions:
 - Medical Expenses
 - Real Estate Taxes
 - Mortgage Interest
 - Home Equity Interest
 - Investment Interest
 - Contributions, Cash & Non-Cash
11. Copy of 2022 Tax Return (*for new clients only*)
12. Closing Papers for:
 - Purchase of NEW Residence
 - Sale of OLD Residence in 2023
 - Purchase of OLD Residence
 - Any Refinancing done in 2023
13. Alimony (*paid or received*) - Need to/from name, Social Security number and/or spouse for Tax Year 2023
14. If assigned, the IRS issued Identify Protection PIN for Taxpayer and/or spouse for Tax Year 2023
15. Year End IRS and 401K Statements
16. December 31, 2023 Non-Retirement Investment Statements