2023 TAX SEASON APPOINTMENT CHECKLIST

P&G ACCOUNTING

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CELEBRATING 16 Years IN BUSINESS

If you are a new client to P&G Accounting please bring your last year's tax return with you.

Returning clients may call me to receive your individual tax organizer with last year's numbers on it to aid you in remembering what you need.

This list contains some of the most common items you will encounter on your return, however it is not a complete list of everything you may need. If you have any questions please call me at 909-912-0183.

PLEASE BRING THIS CHECKLIST AND YOUR LAST PAYCHECK STUB WITH YOU TO OUR APPOINTMENT

EVENT	DOCUMENTS OR INFORMATION NEEDED	✓
New Clients	Previous 2 years return	
Birth or Adoption	Social Security Cards and Adoption Papers	
Divorced or Separated	Divorced: Date Finalized and Copy of Divorce Decree Amount of Alimony Paid or Received; Separated: Copy of Separate Maintenance Agreement	
Health Insurance Coverage	Form 1095 (New Form)	
Additional Members of Household	Dates of Occupancy and Relationship	
Work	W-2 and Last Paycheck Stub	
Job Change	W-2 from both new and previous employers	
Received Interest Income	Form 1099-INT	
Own a ForeIgn Bank Account	Statements and amounts related to the account	
Unemployment	Form 1099-G	
PPP / SBA Loans	Loan amount, terms	
Retirement Contribution	Type of plan and amount contributed	
Retirement Distributions	Form 1099-R	
Social Security Benefits	Form 1099-SSA	
Sales of Stocks, Bonds, etc.	Form 1099-B + Original Purchase Date and Original Cost	
Bitcoin / Virutal Currencies	1099 if received Date Purchased and Cost Date Sold and Proceeds.	
Hybrid / Electric Vehicle	Purchase Contract	
Purchase or Sale of Home Paid Mortgage Interest Refinanced a Home	Escrow Closing Papers (Hud 1 Statement) Form 1098 Escrow Closing Papers and Form 1098	
Inheritance	Will, K-1 from estate	
Lawsuit Settlement	Form 1099-Misc and reason for settlement, attorney fees	
Rental Property	Rental Income and expenses Date and cost of any new equipment purchased	

EVENT	DOCUMENTS OR INFORMATION NEEDED	✓
Renters Credit	Address where you rented and dates lived there	
Cancellation of Debt	Form 1099-A or 1099-C Date property was taken by bank or sold in foreclosure	
Estimated Tax Payments	Dates and amounts paid	
Self-Employed	Profit and Loss Statement Business Miles Home office expenses	
Received Prizes	Form 1099-Misc	
Lottery or Gambling Winnings	Form W-2G and amounts won if not reported on W-2G Total amount of losses	
Medical Expenses Medical Miles	Health Insurance Premiums and total of doctor/dental visits, prescription drugs, and any other medical costs Total miles driven for medical purposes	
State Income Taxes property taxes paid DMV License fees Sales Tax on Vehicles	W-2 and prior year tax return Property tax bills, Form 1098 Copy of registration or amounts paid Purchase Contract	
Charitable Contributions Cash, Less than $250 Cash contribution over $250 Non-Cash, less than $500 Non-Cash, over $500 Non-Cash over $5,000	 Cancelled check, bank record, or written receipt from charity Written receipt from charity Written receipt from charity or other reliable record Written receipt, name and address of charity, date donated, type of property donated, date acquired, fair market value Same as above plus a qualified appraisal	
Job Related Expenses Job Seeking Expenses	Meals, lodging, and other amounts related to your job Expenses related to seeking work, even if no work was found	
Education or Student Loan Interest and Expenses	Form 1098-T, other related expenses such as books, fees, computers, etc.	
Child or Dependent Care	Name, address, phone, and Tax ID number of provider Amount paid to the provider	
Any Received Correspondence from the IRS or State of CA	Copies of any notices, letters, tax bills, etc.	

Please visit my website at www.pngaccounting.com for more information and tools, such as downloadable forms to help you prepare your 2021 tax paperwork for our appointment.

“PROSPER AND GROW WITH AN ENROLLED AGENT YOU KNOW”