

Tax Year: 2023

Very Important > Answer each applicable item

Client Name: _____ **Spouse Name:** _____

Married Filing Jointly Single Head of Household Married Filing Separately

Required:

Email > Client _____ Spouse: _____

Cell phone > Client _____ Spouse: _____

Driver license > Client copy included Spouse copy included (State, Number, Issue and Expiration date)

Tax return copies sent > 2022 2021 (*One year mandatory*) IRS Identity-theft PIN > Letter(s)

Okay for IRS to discuss processing of return with preparer (*lasts for one year, until 4/15/2024*)

Mail to client (Postage applies) **Email via secure portal**

Estimated tax PAID > Payment records attached

E-Filing: PIN signature: First 5 digits of SSN OK? If **No**, then: Taxpayer _____ Spouse _____

Bank account: Checking Savings Copy of voided check Use same account for Fed/state

Routing number: _____ **Account number:** _____

Refund: Direct deposit Check Apply **Due:** Direct debit IRS Pay Check EFTPS

Other income? No Yes \$ _____ (*documentation*) _____

Cryptocurrency? No Yes 8949 from broker **Foreign bank acct?** No Yes _____

Child with: Earned; Unearned income Amount \$ _____

Unemployment compensation \$ _____ State: _____ (include Form 1099-G)

Standard Deduction MFJ - \$27,700; Single - \$13,850; HOH - \$20,800; > 65 +\$1,500/\$1,850

Itemized Deductions Form 1098 Property tax (paid in 2023) Charitable contributions

Sales tax State Income Tax Casualty in declared disaster area

Medical expenses Summary documentation included

Credits/Other

Home office: Regular and exclusive use Sq footage _____ Total home sq ft _____

EITC/CTC/ODC Any additional credits? Residential Vehicle _____

College: AOTC/LLC Form 1098-T plus List of all college expenses \$ _____ (Excel)

For **Traders in Securities** > Trading expenses

For **Mark-to-Market Traders** > MTM Election included Making MTM Election for 2024 (by 4/15/2024)

Trading entity exists: Yes No; Beneficial Ownership Information Reporting required

Additional information: _____
