

SKG Tax Document Checklist for 2023

Check All That Apply to You & Provide Supporting Documents



PLEASE UPLOAD ALL TAX DOCUMENTS AS PDF FILES. DO NOT UPLOAD .IMG, .JPG, .JPEG, .PIC FILES FOR TAX DOCUMENTS. THE SUBMISSION WILL NOT BE ACCEPTED. DRIVER'S LICENSES/VOID CHECKS ARE OKAY AS IMAGE FILES/PICTURES IF LEGIBLE. EXCEL FILES, CSV FILES AND WORD DOCUMENTS ARE ALSO ACCEPTABLE FOR SUPPORTING/SUMMARY INFORMATION TO BE USED IN PREPARATION OF YOUR TAX RETURN (i.e. Profit/Loss), THANK YOU.

Reporting All Income

- IRS Letter 2940C with "Pin" Number (If you have one)
- Wages (Form W-2)
- Interest Income (Form 1099-INT)
- Dividend Income (Form 1099-DIV)
- Stock Sold (Form 1099-B)
- Real Estate/Home Sold (Form 1099-S)
- Assets Sold (Cars, Coins, Collections)
- Rent Income (Form 1099-Misc)
- Farming & Cattle Income (Form 1099-PATR)
- Sole Proprietor Business (Forms 1099-NEC & 1099-Misc)
- S-Corporation Income (Schedule K-1)
- Partnership Income (Schedule K-1)
- Trust & Estate Income (Schedule K-1)
- Oil & Gas Income (Form 1099-Misc)
- State Refund (Form 1099-G)
- Social Security (Form SSA)
- Unemployment (Form 1099-G)
- Gambling Winnings (Form W-2G)
How Much Gambling Losses (Limited to Winnings)
- Alimony Received (Divorce Before 2019)
- IRA/Annuity Distributions (Form 1099-R)
- Retirement Distributions (Form 1099-R)
- Educational Distributions (Form 1099-Q)
Medical Savings Distributions (Form 1099-SA)
Health Savings Distributions-HSA (Form 1099-SA)
- Cancellation of Debt/Mortgage (Form 1099-C)
- Other Income (Inform us, if not already above)

Miscellaneous

- Estimated Tax Payments (Provide Amounts)
Federal 1st 2nd 3rd 4th
State 1st 2nd 3rd 4th
- Had Health Insurance Coverage (Health Insurance Co Sends)
Form 1095-A, Form 1095-B, Form 1095-C
- Have Stocks that Became Worthless in 2023? How much?
Received an Inheritance in 2023? Yes No
Make gifts to individuals? (Different from charity) Yes No
Do you have any investments in cryptocurrency? Yes No

Tax Deductions

- 2023 SEP/SIMPLE/IRA Payments (Form 5498)
\$6,500 (\$7,500 Age 50+) IRA Contributions Due 4/15/24
\$6,500 (\$7,500 Age 50+) Roth IRA Due 4/15/24
\$66,000 Individual SEP Contribution Due 10/15/24
Roth Conversion Done in 2023? Due Date was 12/31/23
- Student Loan Interest (Form 1098-E)
- 2023 Health Savings Contributions-HSA (Form 5498-SA)
\$7,750 (\$8,750 Age 55+) Family HSA
\$3,850 (\$4,850 Age 55+) Single HSA
- Self-Employed Health Insurance Premiums (Paid Personally)
- Alimony Paid (Divorce Before 2019 Only Applies)
- 529 Education Plan Contributions (State Deduction, if Any)
- Unreimbursed Medical Expenses Paid-Doc, Dentist, Eye, etc.
- Mortgage Interest (Form 1098)
- Charitable Contribution Receipts
- Non-Cash Charitable Contribution Receipts (List FMV)
- Educators Expenses Paid (Teachers Only)
- Real Estate Taxes on Personally Owned Real Estate
- Donor Advised Fund?
- Personal & Property Taxes?

Tax Credits

- Child Care Expenses
- College Tuition Expenses (Form 1098-T)
- Residential Energy Credits

Foreign Assets/Income/Cryptocurrency/IBonds

1. Do you own any foreign property, business interests, bank accounts or investment accounts? This includes foreign retirement funds. Yes No
2. Do you have any foreign source income? Yes No
3. At any point in 2023 did you own, buy or sell any interest in any cryptocurrency? Yes No
4. Did you buy any IBonds in 2023? Yes No

Basic Information

Drivers License (Front & Back if New York)

Bank Account Number

Routing Number

Account Type

Bank Name (For Direct Deposit/Debit of Any Refund/Balance Due)