2022 TAX RETURN CHECKLIST

We need all the below information as you may take a standard deduction on the Federal return but itemize on the State return**.**

PERSONAL INFORMATION & DEPENDENTS

1. Signed Engagement Letter (you can download the file or you can pick up the letter from the office)

2. Updated Client Information Sheet

3. Copy of the front and back of your current Driver's License (both spouses if filing jointly)

4. Dates of birth and social security cards for your dependents. If you are entitled to any Child Tax Credit, you must also provide proof of residency for all children. This includes: school records, medical records, or any mail showing both the child's name and address

5. Voided blank check, if you would like direct deposit of your refund, or auto-debit of balance due

INCOME SOURCES

6. Form W-2 wage statements from employers.

7. Portfolio Income statements (Form 1099-INT - Interest statements, Form 1099-DIV - Dividend statements from investments. Form 1099-B - Statements from broker for stock and/or mutual fund sales. (Also bring original cost and date purchased)

8. Form 1099-R - Pension statements

9. Form K-1- Statement from partnerships or S-Corporations

10. Social security statements (1099-SSA or equivalent)

11. Unemployment income received (Form 1099-G), if any repaid, we will need to know how much

12. Rental income & expenses

13. Business income & expenses

DEDUCTIONS, CREDITS & ADJUSTMENTS

14. Form 1098 Mortgage interest

15. Real estate taxes paid. (May be reported on the Form 1098)

16. Charitable contributions. (Both cash and non-cash)

17. Form 1098-T: Tuition Statement. A Form 1098-T is now required to claim any tuition tax benefits

18. Forms 1099-Q: Distribution from a 529 College Savings Plan, please inform us of any 529 contributions made to a NYS 529

19. Student loan interest paid (Form 1098-E)

20. Medical and dental expenses including long term care insurance premiums paid, if any.

21. Documentation for any large purchases (i.e.; car, boat, RV, electric vehicle) that you ***paid sales tax*** on, including the date purchased.

22. Roth and Traditional IRA, UNI-401(k), SIMPLE Plan, & SEP contributions.

23. All 12 months of 2022 financial account statements for all foreign financial accounts and/or cryptocurrency accounts.

For additional information please go to http://youngandcompany.net/