

Andrew J. Mark, CPA PLLC

While every individual return is different the following are the most common items necessary for your appointment:

Employees:

- All forms W2--should have one from each employer you worked for during 2022

Itemizers (Under the new tax law many don't need these--contact us with any questions.)

- Medical/dental expenses paid and not reimbursed by insurance, HSA, or flex plans
- Mortgage statement showing interest and taxes paid (Form 1098)
- Home closing statements if you purchased, sold or refinanced a home during 2022
- Auto registrations paid during the year
- List of cash contributions to charities including religious institutions
- List of non-cash contributions (Goodwill, Salvation Army, etc.)

Parents:

- Social security card for any children born in 2022
- Child care expenses
- Name, Address and Tax ID of your child care providers if they are new this year
- College tuition expenses
- Advance child tax credit letter or amount received from the IRS during 2021.

Savers and Investors:

- Interest (1099INT) and Dividend (1099DIV) statements from banks and brokerages
- All K1s for businesses and investments owned
- List of any sales of bonds or stocks during the year including cost (1099B)

Business Owners/Rental Property Owners

- Total gross income for 2022 (bring any 1099s received)
- List of business or rental expenses summarized by category

Please note if your business/rental has numerous transactions please use the spreadsheet available on our website if you do not have your own accounting system.

New Personal Tax Clients:

- Previous year tax return if we do not already have on file
- A voided check if you want your refund directly deposited into your bank account

Other miscellaneous items:

- All retirement funds taken or distributed usually included on 1099R forms
- Student loan interest paid
- Amount of any contributions to a 529 College Savings Account
- Unemployment compensation received
- Teachers of grades K-12 should have all receipts for classroom supplies.

Please keep in mind these are just common items. If you have something not covered by this list or have any questions about your specific situation please contact me at (480) 991-2820 or andrew@ajmarkcpa.com.