

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 2023

Energy saving purchases

- If you purchased an electric vehicle that qualifies for the tax credit, please provide the purchase information including the VIN
- If you made any energy saving purchases for your home, please provide invoice and energy star details. These include energy audits, doors, windows, heat pumps and solar.

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 2023
- 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 2023
- Child care expenses
- Name, Address and Tax ID of your child care providers if they are new this year
- College tuition expenses

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 2023 (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 us at (480) 991-2820 or andrew@ajmarkcpa.com.

2023 Tax Questions

| | (Y/N) | Other Info |
|--|-------|------------|
| Are there any changes to your address, filing status or dependents. If yes please provide details? | | |
| Did you receive income from more than one state? States _____ | | |
| Did you pay childcare expenses? If so list the amount, provider name, address and ID number | | |
| Do you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, trust or other financial account like life insurance? | | |
| At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (For example Bitcoin.) | | |
| Did you make or will you make any Arizona tax credit donations for the 2023 tax year. If so please bring or attach the individual receipts for each charity or school, the date given is required this year. | | |
| If you itemize deductions, did you make any changes to home mortgages or do you have any mortgage debt that did not improve the home? If yes please attach statements or provide details. | | |
| Did you receive any other income not reported including prizes, awards, gambling winnings, unemployment, jury duty or alimony. | | |
| Did you make any changes to retirement accounts other than contributions through work? If yes please provide all details. | | |
| Did you or will you receive a Schedule K-1 from a Partnership, S Corporation or Trust? | | |
| Did anyone listed on this return have tuition expenses that are required to attend a college, university, or vocational school? If so please attach the schools form 1098-T and a payment listing. | | |
| Did you contribute to a 529 College Savings Account? If yes please report the amount contributed per beneficiary. Note, per beneficiary is a change from previous years. | | |
| Did you make gifts to any one person that exceeded \$17,000 during the year? | | |
| If you receive a refund do you want the money direct deposited? If we do not have a voided check on file or if you have changed your account please send or bring a voided check. | | |
| If you owe tax do you want your account debited automatically? If we do not have a voided check on file or if you have changed your account please bring/send a voided check. If you do not have your account debited you will need to mail a check or pay online on your own. | | |
| Did you receive any notices from either the Internal Revenue Service or a State taxing agency that we have not previously discussed? If yes, please attach. | | |
| May the IRS discuss your tax return with me for the balance of the year? | | |
| If there are any changes in your 2023 tax situation or you expect changes in 2024 please provide details. | | |
| How would you like to receive your completed return. _____ Mail _____ Pickup _____ DocuSign | | |