

# DeBoer, Goodyke, Kahler & Tuttle PC Client Checklist

## Income Information

- W-2s
- 1099-INT (Interest from Bank/Credit Union)
- 1099-B Income (or loss) from Sale of Stock
- 1099-B Income from Virtual Currency
- 1099-G (Unemployment Income)
- 1099-DIV (Dividend Income)
- 1099-R (Pension/Retirement Income)
- SSA-1099 (Social Security Benefits)
- 1099-NEC (Non-Employee Compensation)
- 1099-MISC (Rent Received)
- K-1 (Partnership/S-Corp Income)
- 1099-C (Cancellation of Debt)
- Alimony/Child Support Received
- Rental Income (form at [www.dgkcpa.com](http://www.dgkcpa.com))
- W-2G (Gambling/Lottery Winnings)
- Small Business Income (form at [www.dgkcpa.com](http://www.dgkcpa.com))

## Deductions from Income (If Itemizing)

- Form 1098 (Mortgage Interest Paid)
- Charitable Contribution Statements
- Miles Driven for Charity
- License Tab Fees for Your Vehicles
- Out-of-Pocket Medical Expenses (**may** be able to use as deduction if OVER 7.5% of your AGI)
- Closing Statement from Sale or Purchase of Home
- Property Taxes paid in 2023 (also include bills for winter 2022, summer 2023, and winter 2023)

## Other Deductions from Income

- Gambling Losses
- Alimony Paid (If divorced prior to January 1, 2019)

## Adjustments to Income

- Tuition Paid to College or University (provide 1098T **AND** a detailed statement from college)
- Student Loan Interest Paid
- Adoption Expenses
- Traditional or Roth IRA contributions
- Contributions to a 529 or Other Education Savings Plan
- HSA details (contributions/distributions - and were ALL funds used for medical purposes? Yes or No)
- Educator's Out-Of-Pocket Expenses
- Child or Elder Care Paid to Licensed Provider (provide statement from caregiver)
- Energy Efficiency Home Improvement Credit (see info on [www.dgkcpa.com](http://www.dgkcpa.com))

**Reminder:** Provide details on any federal, state, or city **Estimated Tax Payments** you made for 2023 (dates & amounts)