

2023 Tax Year

Elite Tax & Financial Services, LLC

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Items to bring to your tax appointment:

- Last 2-3 years of tax returns (new clients only)
- Signed “Client Information Form”
- Signed “Engagement Agreement”
- Signed “Audit Protection Form” (new 2020)
- **DRIVERS LICENSE** (new clients yes)
- (existing clients only if changed)
- Proof of residency if you are claiming children (school or medical documents)
- Form 8332 or statement releasing exemption for child
- **1095A, B or C Health Insurance Form**
- **1099-H Health Coverage Tax Credit Advance Payments**
- W-2 Forms for all Wages
- 1099 Forms for:
 - o Interest Income
 - o Dividends Income
 - o Retirement Income
 - o Social Security Income
 - o Unemployment Income
 - o Gambling Income
 - o Other income
 - o 1099-G State Taxable Refund
 - o K-1 Form (Interest in Partnerships, S Corp, Estate, etc.)
 - o Bit Coin Transactions
- Alimony Received & Divorce Date
- All other statements of income
- Rental income and documented expenses
(Schedule E Input sheet from website)
- Self-Employment income and expenses
(Schedule C Input sheet from website)
- Contributions to Self-Employed Retirement Plan
- Stock Sale (Including Cost Basis)
- Year End Statements from mutual funds and stocks
- Alimony Paid & Divorce Date
- Divorce Date
- IRA Basis Information
- IRA Contributions
- IRA year end statements
- Student Loan Interest
- Medical Expenses and Medical Mileage if over 7.5% of AG I
- Health Savings Account
- Real Estate Tax Statements for any property you own
- Vehicle Registration with Property Tax Paid for vehicles, campers, boats, trailers, etc. (only property tax is deductible)
- 1098 Forms for Mortgage Interest
- Receipts for donations of money to charity
- Receipts for donations of property to charity
- Volunteer mileage
- Higher Education Expenses (tuition, books, and fees) with proof of payment
- Child Care Expenses - letter from provider with provider’s name, address, EIN or SS#, amount pd for each child
- Settlement papers - if you bought or sold a house
- 1099 S for sale of home (check closing papers)
- Adoption Expenses
- Estimated Tax Payments - dates and payment amounts
- Foreign Accounts - Bank Statements