

Items Needed to Complete Your 2023 Tax Return

Name _____

Address _____

Email: _____

Phone: _____

_____ All W-2's & Unemployment Tax Statement (1099G).

_____ All 1099's for Retirement Accounts (1099R)

_____ Tax statement(s), Form 1099's, for Interest (1099-INT).

_____ Tax statement(s), Form 1099's, for Dividend(s) (1099-DIV).

_____ All Cryptocurrency/Bitcoin activity.

_____ All student loan interest statements for interest paid during the year.

_____ Stock & investment yearly information, Form 1099 statement(s) & stock basis information.

_____ Closing Statements for purchase & sale of residence.

_____ Mortgage interest statement(s), Form 1098.

_____ Property taxes paid on the residence.

_____ Form 1098-T for education credit for higher education.

_____ Rental income Property - Income & Expenses (see checklist on back).

_____ Self Employed - Income & Expenses (see checklist on back).

_____ Job related expenses - Dues, Uniforms, etc. (for PA & local returns)

_____ Energy efficient home improvements- Documentation required (Appliances not applicable).

_____ Changes in Dependents.

_____ Last Paystub received from each job in 2023.

_____ Form 1095 A from the insurance market place (Pennie- PA insurance).

_____ Charitable Donations.

_____ Out of pocket contributions to IRAs (Roth or Traditional).

_____ Contributions to college 529 Plans.

_____ 1099K- Paypal/ Etsy/ Cash App/Venmo/Etc.



712 Kahkwa Blvd. Erie, PA 16505
Phone 814-456-1040, 814-454-7559
jtushak@tushakaccounting.com

If you are unsure if the document(s) are needed for the preparation of your tax return, please include the document(s) with the information you drop off.

Rental
Income & Expenses Checklist

PROPERTY	KIND AND LOCATION	Acquired Mo - Yr	COST
INCOME		PROPERTY	
RENTS RECEIVED			
OTHER INCOME			
EXPENSES			
ADVERTISING			
AUTO AND TRAVEL - MILES			
CLEANING AND MAINTENANCE			
COMMISSIONS			
INSURANCE			
LEGAL & PROFESSIONAL			
MORTGAGE INTEREST PAID TO BANKS ETC			
OTHER INTEREST			
	CARPENTRY		
	FURNACE		
	PAINTING		
	PLUMBING		
REPAIRS	OTHER		
LIST IMPROVEMENTS SUCH AS NEW ROOF		<i>addt'l comments</i>	
SUPPLIES			
TAXES			
	ELECTRICITY		
	FUEL		
UTILITIES	WATER/SEWER		
YARD/SNOW REMOVAL			
OTHER			
WHAT % OF PROPERTY WAS RENTAL			%

additional comments

Self Employed
Income & Expenses Checklist

Total Sales
Inventory / Materials
Purchased
Inventory at 12/31/2023
Shipping Fees
Postage
Education
Business Mileage
Total Mileage
Travel Expense
Meals
Telephone
Utilities
Internet Expense
Clients Gifts
Dues & Subscriptions
Tools
Equipment
Rent
Insurance
Legal & Professional Fees
Office Expense
Repairs
Supplies
License
Bank Fees
Subcontractors
Credit Card Fees
Intrest