

Items Needed to Complete Your 2022 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 2022.

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

_____ Charitable Donations.



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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.