



2023 Taxpayer Check List

- **Identification - Drivers License**
- **Last Years taxes**
- **Bank Info for Direct Deposit**
- **Income Documents:**
 - **W-2's**
 - **1099's**
 - **Bank Interest 1099 int's**
 - **Social Security Statements**
 - **Unemployment 1099G**
 - **Retirement Distribution 1099R's**
- **Renters Credit form (CRP)**
- **HSA Contribution and HSA Distribution forms**
- **Other Common items:**
 - **Energy Efficient home improvements (doors, windows, furnace)**
 - **College Education Tuition Forms (1098T's)**
 - **Student Loan Int form**
 - **Daycare statement (make sure the provider's SSN or EIN is on it)**
 - **MN Rebate amount (\$260 per person up to \$1300)**
 - ****Kindergarten thru 12th Grade school expenses**
 - ****Itemized Deductions (Schedule A):**
 - **Charitable Contributions**
 - **Mortgage Int statement (1098)**
 - **Property Tax statements**
 - **Personal Property Tax (vehicle tabs)**
 - **Medical Expenses (Insurance premiums, bill's, mileage)**
 - ****Business Expenses (Schedule C):**
 - **Vehicle Mileage (beginning and Ending Odometer readings)**
 - **Home Office Expenses**
 - **Cell phones, Contractors Insurance, ect...**

**** See separate check list**