

Use this checklist to help you gather personal, employment, residential and financial information. You can avoid multiple trips to your tax professional by getting it all together now.

Personal Information

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number

Dependent(S) Information

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Sources of Income

- **Employed**
 - Forms W-2
- **Unemployed**
 - Unemployment, state tax refund (1099-G)
- **Self-Employed**
 - Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
 - Records of all expenses — check registers or credit card statements, and receipts
 - Business-use asset information (cost, date placed in service, etc.) for depreciation
 - Office in home information, if applicable
 - Record of estimated tax payments made (Form 1040ES)
- **Rental Income**
 - Records of income and expenses
 - Rental asset information (cost, date placed in service, etc.) for depreciation
 - Record of estimated tax payments made (Form 1040ES)
- **Retirement Income**
 - Pension/IRA/annuity income (1099-R)
 - Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
 - Social security/RRB income (1099-SSA, RRB-1099)
- **Savings & Investments or Dividends**
 - Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
 - Income from sales of stock or other property (1099-B, 1099-S)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
 - Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
 - Expenses related to your investments
 - Record of estimated tax payments made (Form 1040ES)
- **Other Income & Losses**
 - Gambling income (W-2G or records showing income, as well as expense records)
 - Jury duty records
 - Hobby income and expenses
 - Prizes and awards
 - Trusts
 - Royalty Income 1099 Misc.
 - Any other 1099s received
 - Record of alimony paid/received with Ex-spouse's name and SSN

Types of Deductions

- **Home Ownership**
 - Forms 1098 or other mortgage interest statements
 - Real estate and personal property tax records

- Receipts for energy-saving home improvements
- All other 1098 series forms
- **Charitable Donations**
 - Cash amounts donated to houses of worship, schools, other charitable organizations
 - Records of non-cash charitable donations
 - Amounts of miles driven for charitable or medical purposes
- **Medical Expenses**
 - Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- **Health Insurance**
 - Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
 - Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
 - Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)
- **Childcare Expenses**
 - Fees paid to a licensed day care center or family day care for the care of an infant or preschooler.
 - Wages paid to a babysitter.

Don't include expenses paid through a flexible spending account at work.
- **Educational Expenses**
 - Forms 1098-T from educational institutions
 - Receipts that itemize qualified educational expenses
 - Records of any scholarships or fellowships you received
 - Form 1098-E if you paid student loan interest
- **Job Expenses & Tax Prep Fees- See enclosed Tax Cuts and Jobs Acts of 2020**
- **Eliminating most miscellaneous itemized deductions such as:**
 - **Employment-related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)**
 - **Receipts for classroom expenses (for educators in grades K-12)**
 - **Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)**
 - **Job-hunting expenses**
 - **Record of moving expenses not reimbursed by employer**
 - **Amount paid for preparation of last year's tax return**
 - **Moving expense longer deductible**
 - **Members of the Armed Forces on active duty are still able to deduct their moving expenses.**
- **SALT - State & Local Taxes or Sales Tax**
 - **Limited to \$10,000 per calendar year**
 - Amount of state/local income tax paid or amount of state and local sales tax paid
 - Invoice showing amount of vehicle sales tax paid
- **Retirement & Other Savings**
 - Form 5498-SA showing HSA contributions
 - Form 5498 showing IRA contributions
 - All other 5498 series forms (5498-QA, 5498-ESA)
- **Federally Declared Disaster**
 - City/county you lived/worked/had property in
 - Records to support property losses (appraisal, clean up costs, etc.)
 - Records of rebuilding/repair costs
 - Insurance reimbursements/claims to be paid
 - FEMA assistance information
 - Check FEMA site to see if my county has been declared a federal disaster area
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• Key filing season dates- per IRS website:

- **There are several important dates taxpayers should keep in mind for this year's filing season:**
- **January 23.** IRS begins 2023 tax season. Individual tax returns begin being accepted and processing begins.
- **April 18.** Deadline for filing 2022 tax returns.
- **October 15.** Deadline to file for those requesting an extension on their 2022 tax returns

2022 changes that may affect your tax refund: Source: www.irs.gov

Changes in the number of dependents, employment or self-employment income and divorce, among other factors, may affect your tax-filing status and refund for 2023.

No additional stimulus payments. Unlike 2020 and 2021, there were no new stimulus payments for 2022 so taxpayers should not expect to get an additional payment in their 2023 tax refund.

Some tax credits return to 2019 levels. This means that taxpayers will likely receive a significantly smaller refund compared with the previous tax year. Changes include amounts for the [Child Tax Credit \(CTC\)](#), the [Earned Income Tax Credit \(EITC\)](#) and the Child and Dependent Care Credit will revert to pre-COVID levels.

- Those who got \$3,600 per dependent in 2021 for the CTC will, if eligible, get \$2,000 for the 2022 tax year.
- For the EITC, eligible taxpayers with no children who received roughly \$1,500 in 2021 will now get \$500 for the 2022 tax year.
- The Child and Dependent Care Credit returns to a maximum of \$2,100 in 2022 instead of \$8,000 in 2021.

Visit [Credits and Deductions](#) for more details.

No above-the-line charitable deductions. During COVID, taxpayers were able to take up to a \$600 charitable donation tax deduction on their tax returns. However, for tax year 2022, taxpayers who don't itemize and who take the standard deduction, won't be able to deduct their charitable contributions.

More people may be eligible for the Premium Tax Credit. For tax year 2022, taxpayers may qualify for temporarily expanded eligibility for the [premium tax credit](#). Remember that simply meeting the income requirements does not mean you're eligible for the premium tax credit. You must also meet the other [eligibility criteria](#).

Eligibility rules changed to claim a tax credit for clean vehicles. Review the [changes](#) under the [Inflation Reduction Act of 2022](#) to qualify for a [Clean Vehicle Credit](#).