**New Client Tax Preparation Checklist**

**\*\*Personal information\*\***

* Copy of last year’s tax return (federal and all states)
* Social Security numbers for everyone on your return (if not shown on last year's tax return)
* Dates of birth for any dependents on your return, if applicable
* Copy of your driver’s license (and your spouse if filing jointly)
* Bank account number, routing number, and whether it’s checking or savings if you’d like your refund(s) directly deposited to your account and/or balances due pulled from your account
* Email address and cell phone number for each person e-signing the return
* IP PIN(s) if applicable

**\*\*Questionnaire\*\***

* Complete this google form regarding foreign account and digital assets **if not** filling out the long form questionnaire-

<https://forms.gle/EZbxE3hhuiHC44w89>

(see word doc regarding digital asset info if needed)

**Other items that might apply:**

**Information about your income (not an all-inclusive list)**

* W-2 forms
* 1099-INT, 1099-DIV, 1099-B, or K-1s for interest, investment income, sale of stocks
* 1099-R forms for payments/distributions/rollovers from retirement plans
* 1099-NEC forms (for any independent contractor work)
* 1099-MISC forms (for any rents, prizes, other income)
* 1099-G forms for unemployment income and/or state refunds
* Form SSA social security
* 1099-S forms for income from sale of a property
* 1099-C forms for cancellation of debt
* Rental property income
* Business income
* Jury duty
* Gambling winnings
* Scholarships
* Alimony
* Miscellaneous/other

**Adjustments, Deductions, and Credits**

* Form 1098-E for student loan interest paid
* Form 1098-T for tuition paid (for self or dependents)
* Child care costs: provider’s name, address, tax ID, and amount paid
* Records of IRA or ROTH contributions made during the year (for accounts NOT through an employer)
* Records of Medical Savings Account (MSA) or Health Savings Account contributions (for accounts NOT through an employer)
* SEP, SIMPLE, and other self-employed pension plan contributions
* Self-employed health insurance payment records
* Business expenses by category if self-employed or have rental property (including mileage, if applicable)
* Estimated tax payments made during the 2023 year and for the 2023 year

**Itemized Deductions (Please note Iowa change beginning 2023 – they follow federal standard or itemized deduction, so if you do not itemize for federal, you’ll no longer itemize for Iowa – new for 2023)**

* Forms 1098: Mortgage interest
* Real estate taxes paid
* Personal property taxes (auto registration)
* Cash contributions to charitable organizations
* Noncash contributions to charitable organizations (include description of what was donated as well as thrift value – ie, 5 large bags of clothing to Goodwill with $250 thrift value)

**Other information**

* Adoption expenses
* Amended returns processed in 2023
* Energy credit information
* Qualified electric vehicle credit information

**For Iowa, if applicable**

* 529 contributions
* K-12 expenses
* Date moved into or out of Iowa (if partial year resident in 2023)