

# ELE-Peagler LLC

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## 2023 Income Tax Checklist

Forms	Yes ( )	No ( )
<b><u>INCOME</u></b>		
W-2 (Wages)		
1099-R (Pension, IRA, deferred savings: 401k, 403b, 457)		
1099-G - Unemployment, 2022 State, City Refunds if you Itemized in 2022		
1099 NEC, Schedule C- Contract Worker (no tax withheld)		
Schedule C - Business Income/Expenses		
Schedule E - Rental Property (income, expenses)		
1099 B - Sale of Investments/Stocks		
1099 DIV - Dividend Income		
1099 Int - Interest (Bank, Credit Union, Bonds, etc.)		
1099 SAA - Social Security (see pink background on form Box #5)		
<b><u>ADJUSTED INCOME</u></b>		
F3903 Moving Expenses - <u>Military ONLY</u>		
IRA Contribution or Simplified Employee Pension (SEP)		
Student Loan Interest		
Educator Expense		
HSA (Health Savings Account) or Affordable Care Act (Obamacare)		
<b><u>TAX &amp; CREDITS</u></b>		
Sch A-Itemized Deductions (medical, charity, mortgage interest, property taxes, license tag renewal, State/Local taxes paid in 2023)		
<b>NOTE: Compare Standard Deduction amount to Itemized Deductions. You will be credited with the higher amount</b>		
Child Tax Credit (children) Number of Children under age 17		
Other Dependents (children age 17 and up), others who qualify		
F-2441 Child & Dependent Care Expenses		
Earned Income Tax Credit (EITC)		
<b><u>Cryptocurrency Question</u></b>		
<i>At any time during 2022, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency - <u>Yes or No</u></i>		
<b><u>ALL CLIENTS:</u></b>		
Currently dated picture identification (D/L, State ID); Social Security Card copies should be on file		
<b><u>NEW CLIENTS:</u></b> Provide a copy of 2022 tax returns.		

*This checklist covers the basics. Depending on your tax situation, you may receive additional tax forms (ex: K-1, 1099-Q, 1099-OID, 1099-C, 1099-S, 1099-K, 1099-MISC, etc.). Casualty losses can be claimed subject to declaration of a disaster.*

*If you have not signed up to use our secure client portal to send/receive documents, please contact our office.*