

Quick Tax Checklist

Here is a list of things you may need to give us that are often forgotten:

- Verify expiration date of your Driver's License and verify your direct deposit information.
- Dependent documentation - We need something that shows your dependents lived with you in 2023 (For example: Driver's license, school record, medical record, church record, 1095 proof of medical forms)
- Proof of Medical Insurance - We must verify that you & dependents-maintained health insurance for **ALL of 2023**. CA now has NEW penalties for failure to carry health insurance - Provide 1095-A, B or C forms
- All Tax Documents - Received in the mail such as W2s, 1099s, K-1s, 1099-Div/1099-B/1099-Int, HSA, Mortgage 1098, DMV & charitable contributions.
- IRA Items - Provide amounts contributed or distributed from IRA or ROTH IRAs. If taking ROTH distributions, we may need basis information
- Health Savings Account- Provide 1099-SA for 2023 showing contributions and distributions. To avoid a taxable event, the distributions should have been used for qualified medical expenses.
- Mortgage Refinance Paperwork - if you refinanced in 2023 provide Final closing statements (referred to as a HUD – 1 or a Disclosure Statement) If it was a cash-out refi; please tell me where the funds were applied.
- Education - Provide the 1098-T and the school's account statement showing charges and payments to qualify for education credits.
- Solar Credit - Copy of purchase agreement, date installed and in-operation plus any loan Information
- Rental Property - List of income & expenses by property- we generally do not need all the receipts. For asset purchases or improvements, we need purchase date, cost, and item description.
- Mileage - Those who use their vehicles for business use, provide total mileage for the year and a separate total for business miles.
- Estimated Tax Payments - If you pay estimated tax payments, please list each payment amount & date paid for each agency. Provide any agency letters you may have received updating amounts rolled over a previous year.

Enter to win \$150 gift card!

The drawing will be done end of May 2024

1. Use our new client portal, **TAX DOME**. Activate the account and electronically sign your engagement letter. It will automatically send it back to our office! No need to print, sign and scan back.
2. Once you have activated your TAX DOME account; elect to have an electronic copy of your return and opt out of a having a hard copy printed.

If you do both things, you will be entered in for the drawing.

Take a look at our website!

www.Taxmermaid.com

So many areas of the website that you can explore!

- ❖ Access the secure client portal to upload documents or download your tax return
- ❖ Send a request for an appointment under the “Contact” tab
- ❖ Subscribe to our Newsletter
- ❖ Review our “Resources” tab for a variety of information such as
 - How long do I keep my records
 - Where’s my refund
 - Financial Calculators

