

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 2020 (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 2022**. 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 2022 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 2022 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!

*There will be 3 gift cards to give away (1 gift card per client)
The drawing will be done in Mid-May*

**YOU HAVE UP TO 3 WAYS TO ENTER FOR THE DRAWING
AND INCREASING YOUR CHANCES.**

1. "Like", "Follow" and leave a review on our Facebook page
2. Sign up for our monthly newsletter through our website: www.taxmermaid.com
3. Submit your tax documents to the office by March 5 (with the exception you are waiting on one item such as a K-1 or 1099-Div, submit everything else).

If you do all 3 things, you will be entered in 3 times. This increases your chances of getting your name chosen! If you only do 2 out of the 3, then you are entered into the drawing 2 times. And finally, if you only do 1 out of the 3, you will have one chance to win.

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