

2023 Tax Preparations

Income:

Totals *for the whole year

w-2's	_____
1099-int (interest)	_____
1099-div(dividends)	_____
1099-(G)tax refunds	_____
Alimony received	_____
1099-MISC(income)	_____
1099-NEC (income)	_____
1099-B(capital Gain/loss Brokerage account)	_____
Sale of any property/assets	_____
1099-R (IRA/401K/PENSION DISTRIBUTIONS)	_____
k-1 (Business income/loss)	_____
1099-G (unemployment)	_____
1099-SSR (Social Security)	_____
Other income	_____

Income Adjustments:

Teacher expenses	_____
Health Savings Account	_____
SEP/SIMPLE Contributions	_____
SE Heath Insurance premiums	_____
Contributions to IRA's	_____
1098-Student loan interest	_____
Tuition and fees (college)	_____

Deductions and Credits:

Medical & Dental Expenses:

Insurance premiums: _____

Co-pays & doctor/professionals: _____

Lab & x-ray: _____

Prescriptions: _____

Therapy & long term care cost: _____

Eye care: _____

Dental expenses: _____

Mileage/travel expenses: _____

Other medical expenses: _____

Taxes: _____

Real estate taxes paid: _____

Local & State Taxes paid: _____

Sales Tax paid: _____

Foreign Taxes paid: _____

Estimated taxes paid: _____

Home Expenses:

Mortgage interest (1098-int): _____

Mortgage insurance premiums (PMI insurance): _____

Energy improvements: _____

Windows/Exterior doors: _____

Installation: _____

Other home improvements: _____

Charity donations and Gifts:

Cash:

Who: _____ When: _____ How much: _____

Items:

What: _____ To Whom: _____ When: _____

Mileage:

Why: _____ When: _____ For Whom: _____ How many: _____

Other items:

What: _____ when: _____ to whom: _____ how much/cost: _____

misc Expenses:

union dues _____

work expenses _____

Child/dependent Care

Child care: who: _____ when: _____ how much paid: _____

Education expenses: (1098-T): _____

Where: _____ for whom: _____ how much: _____

Retirement Savings contributions:

401(K)'s: _____

Traditional, SEP, SIMPLE, IRA's: _____

ROTH Contributions: _____

Business Expenses: Schedule C preparations:

Gross Receipts/Income (1099-misc/nec) :

Advertising:

Business Travel:

Lodging:

Transportation:

Meals :

Other:

Commissions and Fees:

Communication:

Contract Labor:

Insurance

Health:

Business:

Workman's Comp:

Interest:

Legal and Professional fees:

Meals

Office Expenses:

Rental Expenses:

Repairs & Maintenance:

Supplies:

Taxes & Licenses:

Utilities:

Postage:

Printing:

Dues & Subscriptions:

Memberships:

Bank Fees:

Mileage:

tolls:

Parking:

Home office deduction:

Size of office:

Utilities total for house:

Decor:

Research & Development

Credit Card Process fees:

Uniforms:

Business Gifts

Conferences/Training/Education

Equipment purchases (below \$2500 ea)

Equipment purchases (above \$2500 ea)

Computer and Internet Expenses
