



2023 FORM 1040 CHECKLIST

**DO NOT STAPLE tax documents. \$100 additional fee for documents dropped off at the office
Provide Prior Year Tax Returns if not prepared by JLPollackCPA**

<https://jlpollackcpa.firmportal.com>

The Firm Portal accepts PDF, DOC(X), XLS(X), JPG, and PNG files. Please differentiate each file name.

INCOME

- ___ W-2 Forms
- ___ Dividends and interest – Form 1099-DIV and Form 1099-INT
- ___ Sales of Stocks and Bonds, Crypto – Form 1099-B and Cost Basis Information if not provided
- ___ Alimony – Need SSN of Payer and Amount, Divorce Date
- ___ Unemployment – Form 1099G
- ___ Social Security – SS Income Form
- ___ Gambling winnings – Form W-2G or 1099, and losses that are deductible up to amount of winnings.
- ___ Cancellation of Debt – Form 1099-C.
- ___ HSA Withdrawal – Form 1099-SA
- ___ Business Income* – Provide income and expense information, including any 1099-NEC or 1099-MISC
- ___ Rental property* – Provide income and expense information, including any 1099-NEC or 1099-MISC
- ___ Sold or purchased real estate – Provide closing statement (HUD-1) for each transaction.
- ___ IRA, Pension, Qualified Education Plan Distributions - Form 1099-Rs, Form 1099-Q
- ___ Partnership, S Corporation, Trust income - Provide K-1s.
- ___ Foreign bank accounts – Provide amount of highest balance during 2021.
- ___ IRS Identity Protection PIN

DEDUCTIONS

- ___ IRA, SEP, SIMPLE, Roth IRA – Provide contributions
- ___ Medical Expenses – Provide Form 1095-A if applicable
- ___ Real Estate taxes – Form 1098 or Tax bill
- ___ Mortgage interest – Form 1098
- ___ Cash or Non-Cash Charitable Contributions – Provide Cash Amounts and Non-Cash Receipts
- ___ Property Taxes Paid on Automobiles/Boats/Land/etc. – Provide Amount
- ___ Student Loans – Form 1098E
- ___ Childcare - Provide name, address and EIN of child care provider and amount paid.
- ___ Tuition Expenses – Provide 1098T and 1099Q if applicable
- ___ Alimony paid? – Need SSN of recipient and amount, Date of Divorce
- ___ Any Estimated Taxes Paid? Please provide amounts and dates.

Income and expenses should be provided **in total by category. Receipts and bank statements will not be accepted.*