

THE YEAR IN SUMMARY



Please complete the below for our records.

LIFE EVENTS

Please mark the appropriate box for any change in the tax year that applies to you

I moved out of state

My filing status changed

I have a new dependent(s)

I made estimated tax payments in 2023

I (or my children) have received, sold, sent, and / exchange crypto-currency

I received interest from a foreign account

Please use the next sheet to provide details about any items you marked.

TAX UPDATES

Unemployment. If you received unemployment this year, **please include your 1099-G with your tax documents.** If you did not receive a copy through the mail, you may be able to obtain a copy from your state unemployment website.

Healthcare subsidy. New Jersey greatly expanded the number of people eligible for a healthcare subsidy. If you received a healthcare subsidy from either NJ or the federal marketplace, **please include your Form 1095-A with your tax documents.**

Extended state COVID benefits. Many states have extended various COVID benefit programs into and through 2023. Please provide all tax forms related to these benefits if you were a recipient of such programs.

Cryptocurrency. The IRS has increased their scrutiny of transaction related to cryptocurrencies. **If you received, sold, sent, exchanged, or otherwise acquired any other financial interest in virtual currency, it is vital you fill out the relevant section below.**

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ADDITIONAL INFORMATION

Please provide details on your year as applicable.

I MOVED OUT OF STATE

the new address

street

city

state

zip

MY FILING STATUS CHANGED

new status

single

married filing jointly

married filing separately

head of household

I HAVE A NEW DEPENDENT(S)

new dependent(s)

first

last

SS#

- -

DOB

/ /

first

last

SS#

- -

DOB

/ /

I MADE ESTIMATED TAX PAYMENTS IN 2023

payments

1st quarter amount

2nd quarter amount

3rd quarter amount

4th quarter amount

I (OR MY CHILDREN) HAVE RECEIVED, SOLD, SENT, AND / OR EXCHANGED CRYPTO-CURRENCY

coin name

amount

I RECEIVED INTEREST FROM A FOREIGN ACCOUNT

country

amount

TAX DOCUMENT CHECKLIST

Please use the below to gather the documents required for your tax filing.

Not every item may apply to you. You may also have relevant documents that don't appear on the list. Be sure to include ALL the documents that apply to your tax situation, even if not listed here.

INCOME

- Wages (all W-2s and 1099s)
- Retirement distributions (1099-R)
- Dividends (1099-DIV)
- Interest (1099-INT, 1099-OID)
- Rental property income
- Social security benefits
- Miscellaneous (1099-Misc, 1099-NEC)

ADJUSTMENTS

- Educator expenses
- HSA contributions
- SEP contributions
- Self-employed health insurance payments
- Alimony
- IRA contributions
- Roth IRA contributions
- Student loan interest paid
- Job-related moving expenses

OTHER INCOME

- Sales of big assets (house, boats, large equipment)
- Scholarships and grants
- State tax refund (1099-G)
- Railroad payments (1099-RRB)
- Unemployment payments
- Gambling winnings (W2-G)
- Alaska Permanent fund

FINANCIAL

- Brokerage account statements
- Annuity contracts
- Money market account statements
- Retirement account statements
- Previous three (3) years tax return filings
(for new clients only)

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OTHER DOCUMENTS

- Employee business expenses
- Casualties and thefts
- Donations (up to \$400)
- Childcare expenses
- Education expenses (1098-T)
- New electric vehicle (EV)
- New home equity loan
- Energy efficient home improvement

FOR BUSINESS OWNERS

- 2023 company financial statements
- Auto expenses
- Business use of home expenses
- Estimated tax payments made
- Previous three(3) years business returns

PERSONAL INFORMATION REQUIRED TO FILE

Banking account info *if using direct debit or direct deposit*

institution

routing number

account number

identification (please select one of the below to provide, include spouse if filing jointly)

driver's license

state issued ID

passport

FOR OUR VALUED CLIENTS

GIVING US YOUR INFORMATION

We know no one likes to take time out of their busy day to gather their documents. To make it easier on our clients, you can now send us your relevant documents ANY of the following ways:



Your secure client portal

(itstax.securefilepro.com)



Mail

(send to 1 Brown Drive, Tinton Falls, NJ 07724-9748)



Appointment

(virtual appointments available)



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