



Hawkins Accounting, Inc
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Annual Checklist

New clients:

We need a copy of last year's income tax return, Social Security (and ITIN) numbers and cards, birthdates for everyone on the return (spouse, children, and other dependents) are needed

Returning clients:

Social Security (and ITIN) numbers and cards, birthdates for **NEW** spouse, children, and other dependents.

If you have moved during the year, provide your new address and date you moved

All Clients:

Direct deposit information

Income:

- W2(s)** for every job you (and spouse) had during the year
- W2G(s)** for gambling winnings, including internet gaming, and mobile phone apps
- 1099 G** if you received Unemployment during the year
- 1095A** if you purchased health insurance through the Marketplace (ObamaCare)
- 1099 NEC(s)** if you are self-employed
- 1099 MISC** for other income
- 1099 INT** Interest
- 1099 R** IRA or 401K distributions and Rollovers
- 1099 R** Pension distributions
- 1099 SA** Social Security distributions
- 1099 DIV** Dividend Income
- 1099 B** Investment Income
- 1098 E** Student Loan Interest
- 1099A** Abandonment
- 1099G** Tax Refund
- 1099S** Real Estate Sales
- 1099C** Cancellation of Debt

Other Income:

Capital gains/losses from Sales of Stocks or Bonds

- Date of purchase and amount paid for stock/bonds to compute capital gains

Rental Properties

- Income & Expenses and include business mileage

Self-Employed

- Income & Expenses and include business mileage

Foreign Income

K-1(s) from Partnership, S-Corporations, Estates and Trusts

Expenses:

Expenses for childcare (provider name, address, and Tax ID number) and whether FLEX Plan money was used to pay for care

Education Credits

College Tuition statement, 1098T(s) AND **Financial printout from the college** plus the cost of books and equipment needed for classes

Purchase qualifying for Residential Energy Credit

IRA Contributions/Retirement Contributions

HSA Contributions

Educator Expenses

If you itemize, deductions must total more than the Standard Deduction

Single \$13,850 MFJ \$27,700 HH \$20,800

Medical Expenses

Mortgage Interest

Sales tax Paid on Major Purchases

Property Taxes paid

Please bring 2023 Summer and Winter Property Tax Statement

Vehicle License Plate

Charitable Contributions (Cash and Non-Cash)/ Mileage

(must have receipt or check stub)

Sales Tax on Major Purchases

Use Tax: Online purchases on which sales tax was not paid