



PERSONAL TAX CHECKLIST

This complete tax checklist will aid you in your document gathering. We have updated the form with the latest IRS and State tax filing requirements.

Prevent Underreporting and IRS Letters:

In our efforts to ensure a smooth and accurate tax filing process, we highly recommend downloading the Wage Tax Checklist directly from the IRS website. This checklist serves as a comprehensive guide to understanding all the sources that reported income to the IRS on your behalf.

Key Benefits:

1. **Complete and Accurate Reporting:** The IRS receives information from various sources about your income, including employers, financial institutions, and other entities. By downloading the Wage Tax Checklist, you'll have a detailed overview of all these sources, helping you avoid underreporting.
2. **Reduce IRS Inquiries:** Accurate reporting significantly reduces the chances of receiving letters or inquiries from the IRS. Providing complete information ensures that your tax return aligns with the records already on file, minimizing the likelihood of discrepancies.
3. **Streamlined Filing Process:** Having a clear understanding of all income sources streamlines the tax preparation process. It helps you gather the necessary documents and information, making the filing process more efficient and less prone to errors.

How to Use the IRS Wage Tax Transcript:

1. **Download from the IRS:** Visit the official IRS website to download your Wage Tax Transcript.
2. **Cross-Check Income Sources:** Review the checklist against your own records, including W-2s, 1099s, and other relevant documents.
3. **Ensure Accuracy:** Use the checklist to verify that all reported income aligns with your records, reducing the risk of discrepancies.

Uploading Documents to SecureFile Pro Client Portal:

After completing the checklist, streamline the document submission process by uploading all necessary documents to our SecureFile Pro client portal.

1. **Secure Document Transfer:** Ensure the security of your sensitive information by utilizing our SecureFile Pro client portal.
2. **Efficient Processing:** Documents uploaded to the portal will be processed promptly, reducing the turnaround time for your tax preparation.
3. **Virtual Contact Form:** If you are busy, complete the Virtual Contact form on the appointment tab on our website. A member of our firm will create your account on the secure virtual document transfer system.

Your Proactive Approach:

By proactively using the Wage Tax Transcript and uploading documents to the SecureFile Pro client portal, you play a crucial role in ensuring accurate reporting and reducing the likelihood of receiving IRS letters. It's a valuable tool to empower you with knowledge about the income sources reported to the IRS, leading to a smoother and more compliant tax filing experience.



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Tax Tip: Reduce Audits

COMPLETED

1. W2's for Income

☐

2. 1099's for Interest and Dividends

☐

3. Total Medical Expenditures/Medical Coverage

☐

- Doctors, Dentists

- Medical Insurance (1095-A, B, C)

☐

4. Total Tax Receipts

- Ad Valorem (Vehicles) Tax

- Real Estate Tax for Residence, 2nd Home or any other property

5. Total Interest Paid

☐

- Mortgage Interest

- Investment Interest

- Bank Statement Interest

6. Sale of Stock (1099 B from broker)

☐

7. Total Charitable Contributions *Include itemized statement

☐

- Cash

- Non-Cash such a cars, antiques, real estate, s& stocks

(provide a list w/value and receipt from receiving organization)

8. ALL Business/Rental Income and Expenses ***attach accounting records**

☐

9. Total Child Care Paid

☐

- Name, Address & EIN or SSN of Provider

10. Personal Real Estate Transactions

☐

- Purchase of New House

- Sale of Old House

- Settlement and Closing Costs

*A COMPLETE LIST OF ITEMIZED DEDUCTIONS AND CREDITS IS LISTED ON LAST PAGE



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COMPLETED

11. Rental Property Real Estate Transactions

☐

- Repairs, HOA, Utilities, Maintenance, Mgt Fee, Property Tax, Mortgage Insurance, Advertising, etc.
- Capital Improvements

12. K1s – Partnership or Sub-S

☐

13. State Income Tax Refund from Previous Year *provide previous tax return

☐

Did we prepare your return(s) last year?

Yes ☐ No ☐

If no, please send a copy of your prior year return(s) and any notices received

14. Retirement Contributions ROTH _____ IRA _____

☐

15. Letter 6419, 2021 Advanced Child Tax Payments

☐

16. Letter 6479, 2021 Economic Impact Payments *inaccurate figures will delay processing

☐

17. Attach Copies of Drivers Licenses for each person on return (if applicable)

☐

18. Attach Copies of SSN for each person on return

***ATTACH COPIES OF SOCIAL SECURITY CARDS AND DRIVERS LICENSES OF EVERYONE ON THE RETURN**

A. Personal information Taxpayer Spouse

Name	_____	_____
Address	_____	_____
City, Prov (State)	_____	_____
Postal (Zip) Code	_____	_____
Preferred phone	_____	_____
Email address	_____	_____
Birth Date (mm/dd/yy)	_____	_____
Citizenship	_____	_____
US SSN/ITIN	_____	_____

B. Are you blind or disabled? Yes ☐ No ☐



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C. Dependents First Child ,Second Child, Third Child

Name	_____	_____	_____
Birth Date (mm/dd/yy)	_____	_____	_____
US SSN/ITIN	_____	_____	_____
Net income	_____	_____	_____

19. Direct Deposit Information for efilg. Routing _____ Account Number _____

How many days (including vacation, non- work partial days) were you present in the United States during?



Tax Tip: This section is used for Non-Resident Aliens working in the US on a VISA

2022 _____
2021 _____
2020 _____

Notes from the Accountant:

Upon completing the checklist, promptly upload it along with all relevant documents to our SecureFilePro portal. Commencing on 1/1/2024, SecureFilePro will serve as the exclusive platform for document sharing between clients and accountants. After uploading documents can a virtual or in-person appointment can be scheduled.

ADDITIONAL INFORMATION: **ANY QUESTIONS OR CONCERN?**



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Tax Tip: Circle all that apply.

Complete List of Deductions and Credits

Adjustments to Income

- ☐ Educator Expenses
- ☐ SEP and/or SIMPLE contributions
- ☐ Self-employed health Insurance
- ☐ Penalty on early withdrawal of savings
- ☐ Alimony paid
- ☐ Deductible Ira
- ☐ Student Loan Interest
- ☐ Whistleblower Fees
- ☐ Estimated Tax Adjustments
- ☐ Office in Home
- ☐ Auto Expense
- ☐ Moving Expenses (Ga not eligible)
- ☐ IRA Contributions / Penalty
- ☐ Roth IRA
- ☐ Medical Savings Account
- ☐ Health Savings Account
- ☐ Disaster Retirement Plan Distributions
- ☐ Investment Insurance Expense
- ☐ Crop Insurance Payments
- ☐ Federally Declared Disaster Loss
- ☐ Administrative Adjustment Request
- ☐ Domestic Production activities Deduction

Credits

- ☐ Elderly or Disabled credit
- ☐ Foreign Tax Credit
- ☐ Child Care Credit
- ☐ Fuel Tax Credit
- ☐ Investment Tax Credit
- ☐ General Business Credit
- ☐ Carryforwards & Carrybacks
- ☐ Residential Energy Credits
- ☐ Work Opportunity Credit
- ☐ Biofuel Producer Credit
- ☐ Research Activities Credit
- ☐ Mortgage Interest Credit
- ☐ Passive Activity Credit Limits Low-income Housing Credit Allocation
- ☐ Credit for Prior Year AMT
- ☐ Combat Pay
- ☐ Orphan Drug Credit
- ☐ Disabled Assess Credit
- ☐ Qualified Electric Vehicle Credit

- ☐ Renewable Electricity Production credit
- ☐ Qualified Adoption Expenses
- ☐ Empowerment Zone Credit

Credit Cont'd

- ☐ Indian Employment Credit
- ☐ Employer SS/Med Taxes Paid Credit
- ☐ Biodiesel Fuels Credit
- ☐ New Markets Credit
- ☐ Small Employer Pension Plan Credit Employer-
- ☐ Provided Child Care Credit
- ☐ Low Sulfur Diesel Fuel Production Credit
- ☐ Energy Efficient Home Credit
- ☐ Alternative Motor Vehicle Credit
- ☐ Alternative Fuel Vehicle Refueling Property Credit
- ☐ Credit to Holders of Tax Credit Bonds
- ☐ Qualified Plug-in Health Insurance Credit
- ☐ Employer Credit for Paid Family and Medical Leave

Itemized Deductions

- ☐ Health Insurance Premiums
- ☐ Long Term Care Premiums
- ☐ Medical Miles
- ☐ General Sales Tax
- ☐ Real Estate Taxes (Property and Vehicle)
- ☐ Home Mortgage Interest
- ☐ Gifts to Charity (cash or check)
- ☐ Gifts other than cash (charity)

To avoid IRS due to underreporting, include all tax documents

- ☐ W2
- ☐ 1099-B
- ☐ 1099-Div
- ☐ 1099-R
- ☐ 1099-INT
- ☐ 1099-G
- ☐ 1099-NEC
- ☐ 1099-SSA
- ☐ 1098-T
- ☐ 1099-K
- ☐ Form 1098-Mortgage
- ☐ K1
- ☐ 1095-A