NEW CLIENT INFORMATION

We are very excited to be preparing your tax return this year. In order to smooth the data collection process, we have created a checklist of information we will need to complete your return. Please note that not all items will apply to everyone.

If you have any questions, please contact me by email or phone.

Thanks,

Rick Wion, EA

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Personal Information:

Full names of taxpayers (as they appear on their Social Security Card)

Dates of birth

Social Security Numbers

Address (Primary Residence)

Dependent Information:

Full name of each dependent (as they appear of their Social Security Card)

Dates of birth

Social Security numbers

Relationship

Whether the taxpayer has full custody of the children or if they share custody.

Income:

Wages ( W-2’s)

Investment Income:

Interest income (1099-int)

Dividend income (1099-Div)

Capital gains (1099-B)

Account statements for any cryptocurrency transactions

Business income and expenses

Revenue:

Copies of any 1099- MISC

Total income not included on 1099- MISC

12 months of Bank statements

Expenses:

Auto expenses, including mileage log and total miles driven

For the year.

Phone expenses

Interest expenses

Equipment purchased during the 2023

Legal and professional fees

Business meals and entertainment

Dues and subscriptions

Continuing education

Overnight travel expenses

Other business expenses

Retirement income:

Pension income (1099-R)

IRA distributions (1099-R)

Social security income (Form SSA-1099)

Income and expenses for any rental properties

State tax refunds received

Unemployment compensation received (1099-G)

Alimony received (for divorces finalized prior to 12/31/2018

Income from pass-through entities

K-1’s from partnerships and S-corporations

Dividend income from C-corporations

Adjustments to income:

Health insurance paid for self-employed individuals

Student loan interest

Educator expenses for teachers

Deductions:

Medical expenses (Must exceed 7.5% of taxpayer income

State taxes paid

Property taxes paid

Personal property taxes

Mortgage interest

Investment interest paid

Cash donations

Non-cash donations

Receipts are required for donations over $500

Vehicle donations require a 1099-C for the charity that received the vehicle

Items valued at more than $5,000 require appraisal which must be submitted with the return.

Documentation for potential credits:

Invoices for solar panels

Purchase agreements for electric vehicles

Education expenses for higher education (1098-T)

Estimated tax payments: (ask for all payments made and date made)

Other information needed to prepare and file return:

Copy of the prior year’s tax return

Email addresses

Contact phone numbers including cell phone

Bank information for direct deposit of refunds or electronic payments

Of taxes due

Documentation of health insurance coverage

Copies of any notices received from any taxing authorities

Personal identify theft prevention number from the IRS (if applicable)