

2023 Tax Preparation Checklist

Sources of Income

- W-2's from any/all employers
- Unemployment (1099-G)
- State Refunds (1099-G)
- Interest income (1099-INT)
- Dividend income (1099-DIV)
- Pension/IRA/annuity income (1099-R)
- Social Security Benefits (1099-SSA)
- Sale of Stocks, Cryptocurrency, or Trading activity (1099-B)
- Sale of real estate property (1099-S) Dates of acquisition and records of cost or other basis in property you sold
- Gambling income (W-2G or records showing income, as well as expense records)
- Trust income (Form K-1)
- Alimony
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Royalty Income (1099-MISC)
- Cancellation of Debt (1099-A or 1099-C)
- Jury Duty
- Hobby
- Prizes/Awards

Rental Income

- Rent (1099-MISC)
- Records of income

Visit www.tuckers4taxes.com for a Rental Property Tax Organizer

Business Income

- Payment Card and Third-Party Network Transactions (1099-K)
- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- Business-use asset information (cost, date placed in service, etc.) for depreciation

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