2023 Tax year

Name **DOB:**

Mailing Address:	
Email Address:	
Cell Phone:	**Home Phone:**
Spouse:	**DOB:**
Email Address:	
Cell Phone:	**Home Phone:**
Last year's Filing Status (Any changes for this year?)	
Number of Dependents (Any Additions or Subtractions)	
Dependents names, DOB and Social Security #:	
Dependents cont.:	
Driver's License number, state, issue date, expiration date-Taxpayer	
Driver's License number, state, issue date, expiration date-Spouse	

INCOME	**Forms**	**Yes**	**No**
Did you receive, sell, send, exchange or acquire any virtual/crypto currency? (ex: Bitcoin)			
Do you have any property, bank accounts or pensions in a foreign country?			
Wages, Salaries or Tips	**W-2**		
IRA Distributions / Rollovers	**1099-R**		
Roth IRA Distributions	**1099-R**		
Pension, Retirement Plan withdrawals (Please note if Military or Teachers pension)	**1099-R**		
Did you take withdrawal in 2020 due to COVID? Did you pay it back?			
Unemployment Compensation? (If so, which state?)	**1099-G**		
Social Security Income	**1099-SSA**		
Reportable Gambling Winnings	**W-2G**		
Business Income - Schedule C or LLC	**1099-NEC & 1099-K**		
Did you use a vehicle for business? Must keep a mileage log			
If Self-employed, do you have an Office in Home?			
Taxable Interest Income (Banks will only send out if interest earned is more than $10)	**1099-INT**		
Dividend Income	**1099-DIV**		
Sale of stocks or bonds	**1099-B**		
Sale of other assets? Need Closing Disclosure form for Real Estate sales/acquisitions	**1099-S**		
Rental Property (please provide federal depreciation schedule)			
Did you have any sales of personal items on Ebay, Poshmark, Etsy, Ticketmaster in excess of $600?	**1099K or 1099Misc**		
Did you use Health Savings Account for medical expenses? Any Distributions from HSA?	**1099-SA**		
529 Distributions - College Savings Plans	**1099-Q**		
Royalties, Partnerships, Estates, Trusts	**K-1; K-2; K-3**		
Schedule K-1's from Publicly Traded Partnerships	**K-1; K-2; K-3**		
Income tax refund from state	**1099-G**		
Alimony Received and date of Agreement (Name and SSN for Ex-spouse will be needed)	Pre-2019		
Cancellation of Debt / Foreclosures	**1099-C or A**		
Long Term Care and Accelerated Death Benefits	**1099-LTC**		
Any other sources of income	**1099-MISC**		
ADJUSTMENTS TO INCOME		**Yes**	**No**
Educator (Teacher) Expenses (Deduct $300 of unreimbursed qualified expenses) (K-12)			
Health Savings Contributions (Do you want to max out contributions?)	**5498-SA**		
If self-employed, do you want to make a contribution to SEP or retirement plan?			
If self-employed, do you pay for your health insurance out of pocket?			
Alimony Paid and date of Agreement (Name and SSN for Ex-spouse will be needed)	Pre-2019		
Did you make any contributions to a Traditional IRA contributions for 2023? If so, how much?	**5498**		
Did you make any contributions to a Roth IRA contributions for 2023? If so, how much?	**5498**		
Student Loan Interest Deduction ($2500 max per return)	**1098-E**		
MARKETPLACE HEALTH INSURANCE		**Yes**	**No**
Do you obtain marketplace health insurance? e.g. Access Health CT	**1095-A**		

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Name **DOB:**

ITEMIZED DEDUCTION		**Yes**	**No**
Medical and Dental Expenses (only amount over 7.5% of AGI is allowable)			
Long Term Care Insurance Premiums paid			
State and Local General Sales Taxes (Did you puchase a vehicle or other large item?)			
Real Estate Taxes			
Personal Property Taxes (car, boat)			
Mortgage Interest (Note whether Home Equity or Principal)(PMI/MIP)	**1098**		
Points (Did you refinance? If Yes, what is the term of the new loan?)			
Investment Interest (Margin Interest)			
Charitable Contributions - Cash			
Non-cash contributions (Salvation Army, Goodwill, etc) Need receipt with value donated			
Auto Donations (Form 1098-C provided within 30 days of sale)	**1098-C**		
CREDITS		**Yes**	**No**
Child Care Expense **Under Age 13**. Includes Summer Day Camps (Need Fed ID Number, Facility Name & address , amount spent)			
Qualifying Education and Tuition (American Opportunity Credit or Lifetime Learning Credit)	**1098-T and Transcript**		
Adoption Expenses			
Energy Efficient Purchases See Worksheet			
Clean Vehicle Credits See Worksheet			
MISCELLANEOUS		**Yes**	**No**
Do you have an Identity Protection PIN **issued by the IRS**? (IPPIN)			
Are you paying back the First-Time Home Buyer Credit? $7,500/15 years = $500 per year			
Did you get any notices from the IRS or State Agencies during the year?			
Did you make gifts totaling more than $17,000 to any individual during the year? (Gift tax return)			
Injured/Innocent Spouse Claim? Should it be filed for Fed and state? (Married filing jointly only)			
Were Estimated Tax Payments made directly to the IRS throughout the year? Need payment confirmations.			
Contributions to Qualified 529 College Savings Plans Need CHET Acct #			
Confirm Direct Deposit Information (Bank Name, Checking or Saving, Routing # & Acct #)			

DO YOU EXPECT ANY CHANGES IN THE FUTURE FOR TAX PLANNING PURPOSES THAT WE COULD HELP YOU WITH.

BY SIGNING BELOW, YOU THE TAXPAYER ACKNOWLEDGE THAT THE ANSWERS ON THIS FORM THAT YOU PROVIDED IS TRUE & ACCURATE TO THE BEST OF YOUR KNOWLEDGE AND BACON & GENDREAU TAX PREPARATION IS NOT LIABLE FOR MISSING OR IMPARTIAL INFORMATION/ TAX FORMS.

Taxpayer Signature/Date

Spouse Signature/Date

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