

DiRosa & Kuchinsky, CPA's

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**BOTH SPOUSES MUST SIGN FORM
8879 AND BRING IT WITH YOU**

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INCOME TAX CHECKLIST

Section A: Complete only if different from prior year or new client

TAXPAYER NAME _____ SS# _____ BIRTH DATE ____/____/____

SPOUSE _____ SS# _____ BIRTH DATE ____/____/____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE # CELL (____) _____ ALTERNATE # (____) _____

E-mail

Dependent's names	Social Security number	Date of birth
_____	_____	_____
_____	_____	_____
_____	_____	_____

Section B: Complete to the best of your ability.

*******YOU MUST REPORT ALL INCOME*******

Include all W-2's, Interest, Dividends, Rental Income, Gambling/Lottery Winnings & Losses, Prizes, Stock Transactions, Social Security & Pensions, Disability, State Tax Refunds, Tips, Alimony, Unemployment, Self Employed Income, 1099's, K-1's.

IRA CONTRIBUTIONS FOR 2023 (NOT ROTH) Taxpayer \$ _____ Spouse \$ _____

MEDICAL EXPENSES – PAID IN 2023 – OUT OF POCKET TOTALS ONLY KEEP RECEIPTS FOR YOUR FILES

Total Medical, Prescription & Dental **PAID** out of pocket \$ _____

* IF YOU ARE COVERED THROUGH OBAMACARE – BRING IN FORM 1095-A

REAL ESTATE TAXES PAID

Primary Home Property Tax \$ _____ 2nd Home Property Tax \$ _____

Senior Property Tax Reimbursement \$ _____ **(REQUIRED) only if paid to you by check**

HOME MORTGAGE INTEREST & POINTS PAID (New purchase bring HUD closing papers)

Primary Home Mortgage Interest \$ _____ 2nd Home Mortgage Interest \$ _____

Points paid on purchase or refinance; provide HUD statement from closing packet

CONTRIBUTIONS – Totals only – keep receipts for your records

Total Amount of Cash or Checks \$ _____ Total Non-Cash Contributions \$ _____

STUDENT LOAN INTEREST & TUITION (Including Books & Supplies) **BRING FORM 1098T - 1099**

ESTIMATED TAX PAYMENTS Federal \$ _____ State \$ _____

DAY CARE EXPENSES

Provider Name _____ Amount \$ _____ SS# or FED # _____

BANK ACCOUNT FOR DIRECT DEPOSIT – Same as last year

New Account # _____ **Routing #** _____

