ROCKFORD ACCOUNTING & REPRESENTATION INC.
David E. Bystry, Enrolled Agent
Licensed to practice before the IRS
P.O. Box 756 • Rockford, MI 49341

Tax Appointment Checklist

- **Personal information**
  - Complete a personal information sheet
  - New Clients: please bring a copy of last year's income tax return
  - Driver's License
  - Voided Check for direct deposit or direct withdrawal for tax refunds/taxes due.

- **Income Data Required**
  - Wages, Social Security, and/or Unemployment
  - Interest and/or Dividend Income (1099 INT or 1099 DIV)
  - State/Local income tax refunded
  - Social Assistance/SSI/Disability/Veterans Benefits Income
  - Pension/Annuity/Stock or Bond Sales (1099 R or 1099 B)
  - Contract/Partnership/Trust/Estate Income (K-1's)
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus (1099 G, W-2G or Wins/Losses)
  - Alimony Income
  - Rental Income
  - Self-Employment/Tips
  - Crypto Transactions
  - Additional Income Items please list:

- **Expense Data Required**
  - Dependent Care Costs
  - Education/Tuition Costs/Materials Purchased (1098 T) *Preferred source document is a printout from college/university listing what has been paid and received*
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance (1098)
  - Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Investment Expenses
  - Real Estate Property Taxes for primary residence with 100% homestead exemption:
    - *Taxable Value and Taxes **billed** during 2023 located on your tax bill for Tax Credits*
    - *Taxes **paid** during 2023 to Itemize.*
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Charitable Contributions Cash/Non-Cash *Receipts will be requested for all items over $250*
  - Purchase qualifying for Residential Energy Credit, Solar, or Electric Vehicle
  - IRA Contributions/Retirement Contributions
  - Home Purchase/ Home Sale (closing statements, improvements, expenses)
  - HSA Account Statement from provider listing all deposits & withdrawals
  - Insurance from Marketplace (1095 A) *Log into account and print or you may receive document in mail*
  - Additional Expense Items please list:

Updated 1/23/2024