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2023 Tax Check List

Please drop off your tax documents. You DO NOT need an appointment to drop off. Your Tax Preparer will contact you with any questions and upon finalization of your return.

Common Income Documents:

- W2 from employer(s)
- W2G Gambling Income
- 1099-R Retirement
- 1099-DIV Dividend Income
- 1099-INT Interest Income
- 1099-G Government Payments (unemployment)
- 1099-MISC Miscellaneous Income
- 1099-NEC Nonemployee Compensation
- 1099-SSA Social Security
- Alimony received (please provide date of divorce)

Tax Office Hours

Mon 9:30 - 6:00

Tues 9:30 - 6:00

Wed 9:30 - 6:00

Thurs 9:30 - 6:00

Fri 9:30 - 3:00

Sat 8:30 - 2:00

Common Deductions Documents:

- 1095-A Marketplace Health Insurance
- 1098-T College Tuition/Fees Deduction
- 1098-E Student Loan Interest
- Retirement Contributions
- Health Care Savings Account
- Medical, Dental and Vision Costs
- Daycare/Preschool/Adoption Costs
- Rental Property Expenses
- Self-Employment Expenses
- State, City, Property Taxes
- Energy Credit (Windows, Doors, Furnace, Hot Water Tank, etc., installed in 2023)
- Electric/Hybrid Vehicle (Proof of Purchase/Lease in 2023)
- Gambling Losses to Offset Winnings
- Charitable Donations
- Alimony Paid (please provide date of divorce)

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