

Thank you for your continued business support in Your Tax Matters, LLC
 Use this checklist to help organize your 2022 tax info (for the 2023 tax season).

Your Tax Matters, LLC	
2022 Tax Related Income, Credits and Deductions Checklist (Rev 1.0)	
Basic Information	Additional Activities to Remember
Full Names, SSN, birth dates for all on tax return	1099-G Unemployment income, state refunds
Address, phone number, e-mail address	K-1 from 1065 Partnerships, 1041 trusts
ID (SS cards and Driver's License, etc.)	K-1 from 1120-S S-Corp
2021 income tax return copy (new clients), filing status	1095A Health Insurance Marketplace
Income / Investments / Retirement	COVID related governmental support income/credit/Loan activities
Earned wages - W2's plus foreign, jury duty, scholarships etc.	Foreign bank accounts reporting (FBAR)
1099-MISC and 1099-NEC Income (contracting, rental, royalties)	Virtual currency activities
1099-INT, 1099-DIV, 1099-B, (financial docs for int, div, asset sales)	Itemized Deductions
1099-R pension and annuity distributions, Roth IRA conversions	Health/long term care insurance premiums
SS-1099/RR-1099 Social Security/Railroad	Medical copays, prescripts, mileage, dental and vision expenses
Alimony received or paid (divorce date)	State/local income tax paid
1099-B Sales of stock, mutual funds, residence and other properties	State/local sales taxes paid (on items purchased, cars, etc.)
IRA, Roth IRA, SEP IRA contributions	Real estate property tax
Schedule C (Self-employed) income (1099-NEC), expenses, and health ins prems	Personal property taxes (vehicle license tax, etc.)
Schedule E (Rental/Royalty) income (1099-MISC)/expenses	1098 Residence mortgage interest including points
Education & Other Tax Credits	Charitable cash contributions and mileage
1098-T Tuition fees education exps, 1098-E Student Loan interest	Charitable NON-cash (goods) contributions/donations
Child and dependent care expenses, HSA and 529 transactions	Gambling income and losses
AZ tax credits (school, charity, foster care), 529 education deductions	Misc. other fees and expenses.
Do you own a business? Provide income, expenses and info below.	
<u>Entity name and address:</u> <u>Business establish date:</u> <u>Principal activity of your business:</u> <u>EIN, phone and website:</u> <u>Is your entity a Limited Liability Company (LLC):</u> <u>Type of Classification (circle one):</u> Schedule C, Schedule F, C-Corporation (Form 1120), S-Corporation (1120-S), Partnership (K-1), Real Estate Rental (Schedule E), Non-Profit	