

TAX DOCUMENT CHECKLIST

I NEED/ PLEASE BRING /SEND ME:

*YOU CAN UPLOAD (VCITA.COM), SHARE A GOOGLE DRIVE FOLDER (AMY.PEEK7@GMAIL.COM),
EMAIL (AMY@PEEKZCONSULTIN.COM), MAIL OR DROP OFF (2927 CHARTIERS AVE, PITTSBURGH, PA 15204),
FAX (412-331-0803).

Please send your tax documents and information to me at least 48 hours prior to your appointment (for remote tax appointments)

CLIENT INFO SHEET *including PTIN's if you have one

2023 TAX PREP WORKSHEET

W-2, 2C (EMPLOYMENT INCOME)

W-2G (GAMBLING EARNINGS)

1099-MISC (MISC. INCOME)

1099-NEC (independent income, contractor wages)

1099-DIV (DIVIDEND INCOME)

1099-INT (INTEREST EARNED INCOME)

1099-B (BROKER STATEMENT OF BUYING/SELLING STOCKS)

1099-R, SSR (RETIREMENT WITHDRAWS/SOCIAL SECURITY PAYMENTS)

1099-SA (HEALTH SAVINGS ACCOUNT WITHDRAWS)

1099-G (UNEMPLOYMENT, STATE REFUNDS)

1099-A, C (CANCELLED DEBT)

1099-Q (WITHDRAW FROM EDUCATION ACCOUNTS)

1095-A, B OR C (PROOF OF HEALTHCARE/MARKETPLACE COVERAGE)

K-1 (PARTNERSHIP/BUSINESS INCOME)

1098 T, E, Q (STUDENT LOAN INTEREST PAID, TUITION PAID, SCHOLARSHIPS, GRANTS)

5498 (CONTRIBUTIONS TO RETIREMENT ACCOUNTS ***YOU MAY NOT GET THIS TILL MAY, DON'T WAIT)

1098-INT (MORTGAGE INTEREST PAID)

STATEMENT FROM CHILDCARE PROVIDER WITH THEIR INFO AND AMOUNT PAID

Energy Improvements made-Solar, Electric, Heaters, HVAC, Heat pumps, Roofs

***IF SELF-EMPLOYED:**

BANK STATEMENTS

CREDIT CARD STATEMENTS

PROFIT AND LOSS STATEMENT (IF AVAILABLE)

****NEW Clients please provide me a copy of your prior year return.**

*****This is not an exclusive list, there are over 700 different tax documents, these are some of the most common. If you think I need it or are not sure, BRING/SEND it to me.**