

## 2023 Tax Data Checklist, Please Complete and Submit with your documents.

**\*\*The newsletter discusses methods in which to get your data to me. In addition to limited appointment times, you may submit via email, Fax, US Mail or drop off in the secure, black, lock box on my porch. You do NOT need an appointment to drop off or submit one of these ways.**

**(If you already added this info to the organizer, you do not need to duplicate here, please circle answers)**

- Did you attach your completed 2023 Organizer? Yes No**
  
- Did your address change? Please write it here or on the organizer, mail will go out to address on organizer by default.**
- New Address \_\_\_\_\_**
  
- Did your phone number change? If you have a preferred number, I can reach you for questions, please write it here. Yes, New # \_\_\_\_\_**
  
- Did your email change? Please ensure I have a good contact email. Yes No**  
**New Email: \_\_\_\_\_**
  
- Do you have any changes in Dependents? For New dependents and new clients, I need dates of birth and socials for anyone on the return, incl. yourself. Please list here if you are adding or removing any Dependents changes for 2023: Please list on Organizer**
  
- Do I have your current bank information? Yes No**  **Notate new routing and account info here: \_\_\_\_\_**
  
  
- Did you use Covered California? Yes No If "yes" attach Form 1095A**
  
- Were you covered for healthcare for CA New Mandate? Yes No If yes, I need Form 1095B or 1095C, please include.**
  
- Do you file as Head of Household, have Self-Employed income, share custody of a dependent, normally receive Earned Income Credit or are a student who qualifies for a Tuition Credit? If yes, fill out backside of this sheet as applicable and submit 1098-T for any Tuition Credits. (Back page only applies to items listed here)**
  
- I will mail via USPS your documents to sign and get back to me unless you mark the box below.**
  
- Please do not mail to me; I live nearby and prefer to do a porch pick up. Call me for a "porch pick-up"**

Name \_\_\_\_\_ Last 4 of Social \_\_\_\_\_

Tax Year \_\_\_\_\_

**ANSWER AS APPLICABLE FOR HOH OR QUALIFYING CREDITS:**

Circle Correct Answers

**For Head of Household Filing:**

1 Are you Married or Single? Married Single  
Yes No

2 Do you have relatives living with you? Yes No

3 What is the relationship to the person(s) living with you? (Circle below)

Son Daughter Brother Sister Niece Nephew  
Aunt Uncle Mother Father Other

4 Do you have other adults living with you? Yes No

If yes, who pays for rent, utilities, and groceries?  
Do you pay for more than 50% of these expenses? Yes No

5 If you are not single or legally divorces, how many months, if any did you live with your spouse?

**For Self-Employed Only:**

1 Do you have records of your self-employed income? Yes No

**For adding New Dependents, EITC and/or CTC:**

1 Is the child you are claiming your relative? Yes No

2 Do you have ID for this child? Circle all that apply:

Birth Cert. Social Security Card Adoption Papers Medical Card

School Records Yes No

3. Did you provide 50% or more of this child's support during 2020? Yes No

4. Can anyone else claim this child as a dependent for 2020? Yes No

5. Have you ever had EITC reduced or disallowed? Yes No

6 Are you and the child US Citizens? Yes No

**For Separated Parents: (not legally divorced)**

1. Where did the Child reside more?

2. Did you file for legal separation? Date?

3. Did you move to a separate home? Date?

4. Did you live with any other adult who contributes to the household financially? Yes No

If "yes" did you provide more than 50% support of the child(ren)? Yes No

5 Do you have a legal separation or divorce decree that allows you dependents in specific tax years? Yes No