

Tax Year 2023 Personal Income Tax Organizer

BE SURE TO BRING:

- Names, SSN and DOBs for all in household
- W2 and 1099 Forms from employer(s)
- Health insurance 1095-A Form
- 1099-B 1099-DIV & 1099-INT for stocks dividends, interest and mutual funds [d]
- K-1 Forms from Trusts, Partnerships, S Corps
- Retirement/Pension/Social Security 1099s [d]
- 1098 Form(s) for mortgage interest paid [d]
- Minnesota 1099-MISC Direct Tax Rebate
- 1099-K Forms from PayPal, Venmo, etc.
- Property Tax Statements for 2023 & 2024
- Home purchase/refinance/sale Closing Papers
- Health Savings Account 1099-SA form [d]
- Day Care expenses & provider information
- College 1098-T (have kids download!) [d]
- Renter’s CRP (Certificate of Rents Paid)
- Any MN Frontline Worker Bonus received
- 2022 Tax Returns (if I did not prepare them)

Personal Deductions (record self-employment separately):

MEDICAL

Insurance (Out of pocket) _____
 Medicine & Drugs _____
 Doctors & Hospitals _____
 Eyeglasses _____
 Long Term Care Ins _____
 LTC Company & Policy # _____
 Medical miles driven: _____

CHARITY [b]

Religious _____
 Other Cash _____

 MN Nongame Wildlife _____
 Non-Cash Donations [c] _____

 Charity miles driven: _____

TAXES

State Taxes [a] _____
 Property Taxes _____
 Auto License Plate/Tabs _____

MISCELLANEOUS

(only for State returns)

Tax Preparation Fees _____
 Investment Fees _____
 Safety Deposit Box _____
Job Expenses
 Uniforms _____
 Tools _____
 Union/Professional Dues _____
 Mileage not reimbursed _____
 Job Publications _____
 Job Education _____
 Job Search Expenses _____
 Moving expenses (for job) _____

Estimated Taxes Paid:	<u>Federal</u>	<u>State</u>
1 st Quarter	_____	_____
2 nd Quarter	_____	_____
3 rd Quarter	_____	_____
4 th Quarter	_____	_____

INTEREST PAID

Home Mortgage _____ Include Form 1098
 Points on Home Purchase _____

EDUCATION

K-12 College

Tuition (Form 1099-T) _____
 Books _____
 Fees & Computers _____
 Student Loan Interest _____ Include Form 1098-E

OTHER

Alimony Paid/Received _____
 Gambling Winnings/Losses _____
 Unemployment _____

[a] You may claim MN income taxes paid **or** sales taxes paid (which requires sales receipts for large ticket items).
 [b] The IRS requires proof/receipts on all cash/check donations >\$500.
 [c] Non-cash donations >\$500 total need to be itemized. Auto donations require documentation from the charity.
 [d] May only be available on-line.

DISCLAIMER: This list is not intended to be all-inclusive...bring everything you think is important for taxes.