

Malar DePape & Associates LLC

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2023 Income Tax Preparation Drop Off Sheet

<input type="checkbox"/>	Did we prepare your 2022 income taxes?		
<input type="checkbox"/>	Check box if contact info has changed		
<input type="checkbox"/>	Name (Including Spouse) _____		
<input type="checkbox"/>	Address (if different from last year) _____		
<input type="checkbox"/>	Copy of Drivers Licenses _____		
<input type="checkbox"/>	Cell Phone _____	<input type="checkbox"/> Y/N	May we text you at this number
<input type="checkbox"/>	Alternate Phone if any _____		Cell Work Home
<input type="checkbox"/>	Email _____		

<input type="checkbox"/>	Dependents _____
<input type="checkbox"/>	Added or Deleting _____
<input type="checkbox"/>	Did Filing Status Change? Circle -Single, Married, Head of Household, Married Separate
<input type="checkbox"/>	Do you have any Foreign Bank Accounts? if yes was there \$10,000 at any given point during the year
<input type="checkbox"/>	Do you have any Virtual Currency?

This Info Is Needed in order to file your 2023 Taxes if had Business Miles or Marketplace Ins

<input type="checkbox"/>	Business Mileage 65.5 Cents
<input type="checkbox"/>	Health Insurance From Market Place If yes we need 1095-A

Income

<input type="checkbox"/>	Wages W-2s
<input type="checkbox"/>	Interest 1099-INT
<input type="checkbox"/>	Dividends 1099-DIV
<input type="checkbox"/>	Sell any Stocks 1099-B
<input type="checkbox"/>	Pension, IRA, Profit Sharing Etc 1099-R
<input type="checkbox"/>	Social Security 1099-SSA
<input type="checkbox"/>	Unemployment 1099-G
<input type="checkbox"/>	Gambling Winnings W2G
<input type="checkbox"/>	Self Employed Income (1099-NEC) & Expense Detail
<input type="checkbox"/>	Rental Property Income (1099-Misc) & Expense Detail
<input type="checkbox"/>	(1099K) if received

Deductions

<input type="checkbox"/>	Medical Expense over 7.5% of income before \$1 counts
<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	Car Tags
<input type="checkbox"/>	Mortgage Interest (1098)
<input type="checkbox"/>	Noncash donations over \$250 need detail and receipts
<input type="checkbox"/>	Cash Donations over \$250 need detail and receipts
<input type="checkbox"/>	Gambling Losses if had winnings

Continued on back

Adjustments

- Health Savings Contribution **5498-SA**
- Health Savings Distribution **1099-SA**
- Day Care for kids under 13 (**Stmt from provider**)
- Educator expense Taxpayer and/or spouse
- Alimony paid or received if divorce was before 1.1.2019
- Student Loan Interest **1098-E**
- Tuition-college (**1098T**)
- IRA Contributions (**5498**)

Did you make any Estimated payments

Fed Amount & Date	State Amount & Date	City amount and Date

Household Income Under \$67,300 for Michigan Homestead Credit

If own house
 Property taxable value _____
 Summer and Winter 2023 taxes assessed even if not paid

If renting
 Monthly rent _____
 Months rented _____
 Landlord name and address _____

Refund Method

- Paper Check
- Direct Deposit Confirm # even if Same as last year

New Account

Checking or Savings

Bank Name _____

Bank Routing Number _____

Bank account Number _____

Any Questions you have or any thing you think we should be aware of when preparing 2023 taxes