

Kelly Haverkate Tax & Bookkeeping Services

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Hello and welcome! We're happy to assist with your 2023 Tax Return.

New Clients:

We've prepared the following checklist to help assure that we have the information that we'll need. Along with this general checklist you may also use the blank organizer for a more detailed checklist as well as an overview of documents, income and expenses to give you a reminder of forms you may be collecting to help prepare a correct tax return. This organizer can also be located on the website under "client resources".

- Full name as it appears on your social security card & birthdate
- Social Security number or Individual Taxpayer Identification number or current mailing address, phone number, and email address.
- Address, phone number or email address
- Names, birthdates & social security numbers of your spouse and/or dependents.
- Your Driver's license (and for spouse).
- Your IRS Identity Protection Pin, if you have been issued one (and for spouse).
- Tax returns from the prior 2 years (prepared by a former tax preparer, or yourself)
- Bank name and account routing number and account number for direct deposit
- If you pay for childcare, we will need the name address and tax ID# from your provider

Returning Clients:

If you've had any changes in the above, please provide the new and corrected information. (If you renewed your driver's license or ID in 2023 I will need the new issue date and expiration date.

All Clients:

In addition to your regular tax forms showing income sources, or expenses we will need the following information specific to 2023:

- Have any new dependents? Change in marital status?
- Did you receive unemployment income? If yes, provide 1099G
- Did you receive a distribution from a retirement plan (401K, IRA) due to Covid-19? If yes, provide 1099R
- If you own a business, a farm or rental property, you will need:
 - The TOTALS of your income and expenses, by category. You must have receipts and other backup documentation in your files. This means receipts, a mileage log, etc.
 - Please utilize the Farm or Business organizer pages on the Client Resources Page.
- Did you have health insurance through the marketplace? If yes, provide a form 1095-A
- Did you make any cash donations for which you have receipts? Let me know!
- Did you pay for higher education for yourself or your dependent? You will need a 1098T from the college and receipts totaled for expenses required by the school to attend classes.
- Did you pay for child or dependent care?
- Do you own any foreign investments? (or money in bank accounts?)
- Have you purchased or sold any digital assets? (Crypto currency like Bit Coin or NFTs?)
- **If helpful, please utilize the "Client Organizer" on the client resources page. Or, if you are a returning client you may request a custom organizer that includes your information from last year, for comparison.**