ERBFINANCIAL

WE MAKE FILING LESS TAXING

☑ Tax Preparation Checklist - 2022 Tax Year

- ☐ 1. Copy of both sides of your Driver's license or State ID. Joint filers need both IDs. (Not necessary if we already have your current and valid IDs on file.)
- ☐ 2. Wage Statements (W-2) and 1099 Forms
- ☐ 3. Pension, IRA, or Annuity Statements (1099-R)
- ☐ 4. Social Security Income Statements (SSA-1099)
- ☐ 5. Interest & Dividend Income Statements (1099-INT & 1099-DIV)
- ☐ 6. Consolidated tax statements of investment income, sales, and purchases
- ☐ 7. Unemployment Income Statements. In NY State, get NY Form 1099-G online at https://www.tax.ny.gov/pit/file/1099g.htm or call 888-209-8124.
- ☐ 8. Student Loan Interest paid
- ☐ 9. Individual Retirement Account (IRA) contributions
- ☐ 10. Education Expense Information (1098-T, and detail of expenses paid in - Call us.)
- ☐ 11. Dependent Care expenses: Amount paid for each child; Providers Name, address, Federal ID number, and amount paid to each provider
- ☐ 12. Record(s) of Estimated Tax Payments made (Federal and State), including dates paid
- ☐ 13. If you Itemize: Property Taxes, Mortgage Interest, Charitable Contributions, Medical
- ☐ Expenses if over 7.5% of Adjusted Gross Income
- ☐ 14. Property tax statements for primary residence <u>even if not itemizing</u>.
- ☐ 15. Energy related expenses: New furnace, windows, doors, insulation, solar
- ☐ 16. Major changes from last year. If new to Erb Financial, a copy of last year's return
- ☐ 17. Any other income, deductions, questions, or information you think might impact your tax return (Space for notes below).
- ☐ 18. Current Phone number: ____________________________ Best time to call: ___________
- ☐ 19. E-mail: ____

We will call you to discuss your tax information before completing your returns. At that time we can review your situation to make sure we have all of the necessary information to properly complete your tax forms.

Notes:

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Visit us at ErbFinancial.com