



2023 Personal Income Tax Checklist

Checklist Instructions: Please review the list of all income, adjustments, deductions, and credits listed below and the total number of each form that applies to your household for 2023. We will need you to provide the respective supporting documentation for each item as it is listed in the “Required forms and documentation” column.

INCOME: Required Forms/ Documentation:	<i># of forms</i>
W-2 (Employer/Paycheck)	
SSA-1099 (Social Security)	
1099-G (Unemployment)	
1099-INT (Interest)	
1099-DIV (Dividends)	
1099-R (Retirement distributions)	
1099B (Cryptocurrency/virtual currency)	
1099-B (Consolidated Statement/Investment Activity)	
1099-SA (Health Savings Account (HSA))	
W2-G (Gambling)	
K-1 (Privately Held Corporations/Partnerships) <input type="checkbox"/> RAC prepares this for me	
Small Business/Real Estate/Rental/Farm (2023 income statement, balance sheet and asset schedule)	
1099-Q (Qualified Tuition Program)	
1099-C (Forgiven Debt or Foreclosure)	
1099-K (Third Party Network Sales/Income)	
1095-A (Marketplace Health Insurance)	
Other:	

DEDUCTIONS: Required Forms/ Documentation:	<i># of forms</i>
1098 (Mortgage Statement and Property Taxes Paid)	
1099-S (Purchase and/or Sale of Real Estate (attorney-provided))	
Charitable Donations (Estimated value of donated items OR Receipt for cash)	
Unreimbursed Employee Expenses (Total amount, receipt, details)	
Home Office Expenses – Self-Employed Only (Square footage of office and all relevant expenses)	
Mileage - Business, medical and charitable (Vehicle description, total annual miles, deductible miles)	
Other:	

ADJUSTMENTS: Required Forms/ Documentation:	<i># of forms</i>
1098-E (Student loan payments)	
5498 (Retirement account contributions (non-payroll))	
5498-SA (Health Savings Account (HSA) contribution)	
Cash Charitable Contributions (Charity and donation letters)	
Other:	

CREDITS: Required Forms/ Documentation:	<i># of forms</i>
Childcare or other dependent care expenses (EIN for provider and total amounts paid for each child)	
1098-T (College Tuition – for you, spouse, or dependent)	
Full-Year Firefighter or EMT Volunteer (NYS) (Name & address of where you volunteered)	
Certified energy efficient property purchase (paid receipts)	
Other:	

OTHER: Required Forms/ Documentation:	<i># of forms</i>
Required: All taxpayers & spouses need a copy of valid Driver’s License or NYS ID card to e-file	
All 2023 estimated income tax payments (Record of all payments made to each agency (dates & amounts))	
IRS or NYS Tax Notice (Complete copy of the tax notice(s))	
2023 NYS STAR Tax Relief Check (Amount or check stub provided by NY when you get the check)	
Other:	

Drop off or submit your documents online using the upload link at www.rac-co.com