

"2023" READINESS CHECK LIST

1. If new, need cards showing Social Security Numbers and/or ITINs along with birth dates of all and proof of residency of dependents.
2. Need ALL W-2's, 1099's, 1099-K and 1098's: those for interest, dividends, investments, tax refunds, self-employment, sales, pensions, IRA rollovers, unemployment, Social Security, 1099-A, 1099-C, and any other income along with those showing mortgage interest paid.
3. Need 1098-T's with the financial transcript from the college showing 2023 education expenses plus cost of books and needed equipment.
4. **IMPORTANT: Bring your last pay statement & your last pension statement - contains necessary information.**
5. Any miscellaneous or other income and related expenses.
6. Contributions to "Traditional" and "Roth" IRAs & Health Savings Accounts, plus 1099-SA for HSA distribution.
7. Payments for health insurance, RX insurance, and DDS insurance.
8. **Property tax statements for both summer and winter 2023 as well as information giving 2023 taxable value of personal residence.**
9. Rent: Need name and address of landlord and amount of rent paid.
10. **E-file:** Need correct bank account number for direct deposit.
11. Need drivers license information for both taxpayer and spouse.

AFFORDABLE HEALTH CARE (ACA) (Obamacare)

- You need to bring Form 1095-A if you bought insurance through the Marketplace.
- CURRENT CORRECT ADDRESS for 2022 & 2023 is needed by 2/12/24

► Please provide us with your email address if you have one. Will be used for appointment reminders.



**FORMER MARINE CITY CLIENTS WILL CONTINUE TO BE TAKEN CARE OF IN OUR ST CLAIR OFFICE:
817 CLINTON AVE, ST CLAIR, MI 48079**

ST CLAIR PHONE NUMBER 810-329-8818

Website: meredithtax.com

continued on other side ►

Income Taxes•Electronic Filing•Bookkeeping•Securities•Notary

48060
Port Huron, MI
1721 Pine Grove
(810) 982-6300

48079
St. Clair, MI
817 Clinton Ave
(810) 329-8818

Meredith Tax Service
At
We Appreciate Your Business

THANK YOU

15. Copies of K-1's from partnerships, S Corporations, estates and trusts.
16. Business mileage – Bring start & end odometer readings for 2023 with business miles, interest paid on vehicle, & plates.
17. Year-end statements showing transactions from mutual funds/brokerage accounts. **Important:** need all pages
18. If you bought, sold or refinanced during the year, bring all closing statements.
19. If have foreign bank or retirement accounts, bring 2023 statements.
20. If IRA transferred directly to church or charity, bring proof.
21. Bring a record of the **dates** and **amounts** of any estimated tax payments made, and record of any other payments made.

**** For 2020, 2021, 2022, or 2023 information needed if had:
Qualified energy efficient items for your home: windows,
doors, insulation, furnace, air conditioner, or water heater.

Bring a list of your questions/issues/concerns for this tax year
& future years