

2023 TAX DATA SHEET

	TAXPAYER	TAXPAYER (SPOUSE)
NAME		
SOC. SEC. #		
DRIVERS LIC. #		
LIC ISSUE DATE		
LIC. EXP. DATE		
OCCUPATION		
DATE OF BIRTH		
HOME ADDRESS	CITY, ST, ZIP	
TELEPHONE #	HOME () -	CELL () -
	CELL () -	
EMAIL ADDRESS(ES)		SCHOOL DISTRICT -

NAME (FULL)	SOC. SEC. #	RELATIONSHIP	BIRTH DATE	MONTHS AT HOME	CHILD CARE EXPENSES

CHILDREN AND / OR DEPENDENTS – USE BACK IF NEEDED

BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND

Providing this information will significantly decrease the time required to receive your refund!

Bank Name: _____ Account Type Checking ___ Savings ___ Joint? ___
 Routing Number _____ Account Number _____

BRING THIS TAX INFORMATION WITH YOU

- All W2's from your employer
- All Interest and Dividend Income Statements (**1099 INT, 1099 DIV, 1099B** Statements) from banks, credit unions, and brokerage firms (including all VIRTUAL currency transactions—such as Bitcoin etc).
- Social Security statements (**SSA-1099**); Pension, Annuity, and/or IRA distributions (**1099R**)
- Real Estate tax bills for 2023 (paid or not) and for previous years paid in 2023.
- Any **other income** statements for miscellaneous income, **unemployment, alimony, prizes, state & local tax refunds, lottery winnings (W2G), etc.**
- Tuition information for each college student (**1098-T**) and a list of all related college expenses
- If this is your first year with Heemer Klein, we need a copy of your 2022 and 2021 tax returns to best prepare your 2023 return.
- If you were in the health care marketplace and received a government subsidy, you should have received a form **1095-A**. We must have this form to reconcile your premiums.



2023 ESTIMATED TAX PAYMENTS PAID (TAXPAYER MUST COMPLETE, IF APPLICABLE)

	FEDERAL ESTIMATES		STATE ESTIMATES		CITY ESTIMATES	
	AMOUNT	CHECK# & DATE	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE
4/18/23						
6/15/23						
9/15/23						
1/18/24						

Tax Updates

- Please see our website www.hkglcpa.com  for the latest tax updates.

Schedule A - Itemized Deduction Worksheet:

The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing **jointly (\$27,700)**, married filing separately and **single filers (\$13,850)**, and **head of household (\$20,800)**. **(If over 65 or blind, add \$1,850 per taxpayer.)**

Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. **DO NOT CLAIM** as deductions any bills that have not actually been paid within the calendar year of 2023.

MEDICAL	CONTRIBUTIONS	TAXES
Dentist -	CASH OR CHECKS - ALL CONTRIBUTIONS MUST HAVE BOTH STATEMENTS AND CANCELED CHECKS TO QUALIFY	This category is limited WITH all State and Local Income Taxes.
Doctors -		Home Property Taxes -
Hospital -	Church -	2 nd Home -
Ins. Reimbursement -	College / University -	Land -
Lodging Expenses -	Other -	License Tabs -
Long Term Care Premiums -	NON CASH - IF OVER \$500 MUST HAVE DETAILED LIST AND VALUE OF DONATION WITH NAMES AND ADDRESSES	Interest Expenses
Medial Insurance – other than Medicare -		Salvation Army/Goodwill -
Miles Driven	Other -	*Home Equity -
Prescription Drugs	Other -	**LAND CONTRACTS -
Other (glasses etc) -	Charitable Mileage -	

***For Home Equity Loan** – Deductible only if used to purchase or improve home.

****For Land Contracts** – We need the name, address, and social security number of the owner.

ADDITIONAL INFORMATION WE MAY NEED

*Alimony – paid (or received) -	
Date Divorce agreement executed -	
**Child Care expenses (12yrs/under)-	
Gambling losses -	
IRA Contributions made before April 15, 2024 -	
Did you contribute to a Health Savings Acct (HSA)? (Do NOT include employer's contributions.)	
*Must have name and SS# of recipient	
**Must have name/address/ID# of caregiver	

