

PS It's Tax Time
609 Henriette Ave
Crivitz, WI 54114
920-434-5211
2023 Drop off information

Name _____ Phone _____

Spouse _____ Phone _____

Driver's license number, issue date and expiration date for both of you. **IF NEW CLIENT**

Did you move? **New address** please! _____

Did you have any **children in 2023**? Need name, date of birth and ss # _____

Bank Information if you **changed banks**: Routing number _____ Acct # _____

Did you have **unemployment**? Yes/ No If yes print your 1099G from the website. **(IS NOT IN US MAIL)**

Did you have **Obamacare** insurance (Marketplace/Common ground? If yes need **1095A**

If you have a **HSA** (Health savings account) you need the **distribution** amount for 2023. Either get that online at the bank that has the account, or they may have mailed a form. The contribution is on your W2 **Cost for health insurance** if not directly from employer. **Mostly these will be retired people**. The cost of your Medicare is on the SSA form, but I need additional paid for Part B, dental and vision. This is a deduction on the Wisconsin return. Total paid out of pocket, not on SSA _____

Did you **contribute to a ROTH IRA or TRADITIONAL IRA** need the \$ _____

Did you **sell a house**? Need new address and closing document for both.

Did you **take money** out of any IRA/investments/stocks? Yes- Need 1099 for each.

Any home **energy improvements**: new windows/doors/air conditioning/furnace? Will need items and costs, there was some changes this year so please submit what you have done.

Children in **daycare**? Provider's name, address, tax ID and the amount paid for 2023.

Children in **college**? Need 1098T and expenses that were paid by you or the student if you are claiming them. If they are under 24 and still supported by you.

Primary residence **property tax** bill, indicating amount paid in 2023. I can look that up for you if needed.

Rent paid for 2023 _____ **Heat** included **Y or N**

Charitable donations are not usually deductible on federal but for WI there sometimes is so please provide total in cash/credit card donations for 2023. Also an amount for non-cash donations separately.

Student loan interest amount paid in 2023. _____

Please include all income sources: W2, Social Security SSA1099, 1099INT, 1099R, 1099Misc, Gambling winnings(W2G), cancellation of debt(1099C), alimony and all other incomes.