

MILLER & COMPANY CPA's, PLLC
INCOME TAX CHECKLIST-2023
(Please complete and bring to your appointment)

GENERAL INFO: (New Clients Only)

- ___ Taxpayer's Birth Date ___/___/___
- ___ Spouse's Birth Date ___/___/___
- ___ Taxpayer's SS# _____-____-_____
- ___ Spouse's SS# _____-____-_____
- ___ Birth Dates of Dependent Children
- ___ Social Security Cards (Copies) for All
Dependents (New clients/or dependents only)
- ___ **Health Insurance Forms (1095-A, 1095-B, 1095-C)**
(If Applicable)
- ___ **2022 Income Taxes (new clients only)**

INCOME:

- ___ Wage Income (Include all W-2 Forms)
- ___ Interest earned on savings, etc.
(Include all 1099- INT Forms)
- ___ Dividend Income (Include all 1099-DIV Forms)
- ___ Social Security Benefits Received in 2023
(Include Form SSA-1099)
- ___ State of Utah Tax Refund Received in 2023
Amount \$ _____
- ___ Unemployment Benefits Received in 2023
(Include Unemployment Form 1099G)
- ___ K-1's (Partnership, Sub S Corporation Income)
- ___ IRA Distributions
(Include 1099 IRA Forms and/or Year end statements)
- ___ Pensions (Include all 1099-R Forms)
- ___ Rental, Lease Income/Expenses
(Include 1099-MISC Forms)
- ___ Disability Income (Include forms received)
- ___ Business Income/Expenses
- ___ Farm Income/Expenses
- ___ Alimony Received in 2023 (If divorce before 2019)
- ___ Prizes, Awards, Gambling & Lottery Winnings
- ___ Other Income (please specify)
- ___ **HSA Distributions (Include Form 1099-SA)**

ADJUSTMENTS TO INCOME:

- ___ Penalty for early savings withdrawal
- ___ IRA contributions made (or to be made) for 2023
- ___ Interest on Qualified Student Loans (Form 1098-E)
- ___ **HSA Contributions (Include Form 5498-SA)**

Itemized Deductions

TAXES PAID:

- ___ Real Estate Taxes Paid in 2023
- ___ Sales tax paid on vehicles, large items in 2023

INTEREST PAID:

- ___ Mortgage / HELOC Interest Paid in 2023

MEDICAL EXPENSES:

- ___ Medical/Hosp/Dental Insurance Premiums Paid
**Do Not Include Pre Tax amounts deducted from wages
- ___ Prescription medications/drugs
- ___ Doctor Bills Paid in 2023
- ___ Dentist Bills Paid in 2023
- ___ Hospital Bills Paid in 2023
- ___ Medical Items Purchased
(Glasses, Dentures, etc.)
- ___ Lodging for Medical Treatment
- ___ Mileage for Medical Treatment

CONTRIBUTIONS: (*Over \$250 require a receipt)

- ___ Church Cash Contributions
- ___ Other 501(c)3 Qualified Cash Contributions
- ___ Non-cash Qualified Contributions
- ___ Vehicle Mileage on Charitable Work

MISCELLANEOUS DEDUCTIONS:

- ___ Gambling Losses (Limited to Winnings)

TAX CREDITS:

- ___ Child Care Expense Paid in 2023
*The taxpayer must fill out from W-10 for each child care provider in order to take the child care credit in 2023. (If you need a W-10 form, we can provide one for you.)
- ___ Adoption Expenses
- ___ **Premium Tax Credit (Include Form 1095-A)**
- ___ **Tuition & Related Expenses (Form 1098-T)**

Appointment

Date: _____

Time: _____

**56 North Main Street
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(435) 896-4301**