

**Following is a list of the more common items you should bring if you have them.**

- - Wage statements (Form W-2)
- - Pension or retirement income (Forms 1099-R)
- - Any other Form 1099 you have received
- - Form to verify health insurance coverage (Form 1095)
- - Dependents' Social Security numbers and dates of birth
- - Last year's tax return. If we did your taxes last year, we have it
- - Information on education expenses
- - Information on the sales of stocks and/or bonds
- - Self-employed business income and expenses (Forms 1099-Misc & Forms 1099-NEC)
- - Lottery and/or gambling winnings and losses
- - State refund amount
- - Social Security and/or unemployment income
- - Income and expenses from rentals
- - K-1's from any Partnerships, S-Corps, or Trusts
- - Record of purchase or sale of real estate
- - Medical and dental expenses
- - Real estate and personal property taxes
- - Estimated taxes or foreign taxes paid
- - Receipts for cash and non-cash charitable donations
- - Mortgage or home equity loan interest paid (Form 1098)
- - Child care expenses and provider information. You will need the address and either their EIN or SSN.
- - And any other items that you think may be necessary for your taxes. Generally, a good rule of thumb is: if you are not sure if you need a document bring it.

**Tax filing deadlines for filing income taxes in 2023.**

- *Individual income tax returns* are due Tuesday, April 18, 2023. If you request an automatic six-month extension, this date is Monday, October 16, 2023.
- *Partnership and S-corporation returns* are due on Wednesday, March 15, 2023. If you request an automatic six-month extension, this date is Monday, September 18, 2023.
- *Corporation income tax returns* are due Tuesday, April 18, 2023. If you request an automatic six-months extension, this date is Monday, October 16, 2023

And as always please check with your tax advisor as there are some exceptions in 2023.