



## Liu Tax Group Inc

Small Firm. Big Difference.

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# 2023 US. Resident Individual Tax Preparation Checklist

Use this list to help you get organized to file your taxes return. Note: If you're getting free help filing your taxes in person, make sure you bring a photo identification for all adults in your household. **All information can upload at [www.liutaxgroup.com](http://www.liutaxgroup.com).**

### Step 1: Provide Basic Information

- **All family member name (Name will same as they appear on the Social Security Card (SSN) or Individual Taxpayer Identification Number letter (ITIN) for you and all dependents (including children and elderly relatives for whom you provide care)**
- **Date of birth and relationship** (son, daughter, mother, etc.)
- **How many months in US in 2023**
- **Current address** (it may be different from the address on your employment records)
- **Contact phone number and Email address**
- **Occupation**
- **Copy of drive license for both family member.**
- **Copy of your personal check for refund.**
- **Please provide 1099G if you receive any unemployment benefit.**

### Step 2: Provide Tax Report Documents

- 2022 Tax return copy for Federal and state if you are new client.
- **W-2, 1099MISC, Tips and all other income documents.**
- **1099 INT (Interest statement)**
- **Foreign income and tax** documents.
- All **Foreign bank account or security account**, include owner's name, bank name, address, phone, account number; beginning & end year balance, maximum amount.
- **1098s** showing payments you've made (school loans, property tax).
- **Childcare expenses:** name, address, Tax ID or Social Security Number of the childcare provider
- **Business expenses and assets:** We provide worksheet if you need it.
- **Partnership or Corporation income and expenses:** State business register letter, Article of organization, partnership agreement, EIN letter.
- **Investment property.** All income and expenses. If you purchase in 2023, please provide settlement (HUD) document. If you purchase prior, please provide detail depreciation carry over to 2023. We provide worksheet if you need it.
- **Home office.** Please provide square feet of home office and total square feet of home. The actual expenses.
- **College:** loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)
- **Educator expenses** for teaching grades K-12 (school supplies and materials used in the classroom)
- **Charitable donations:** list of contributions and amounts, receipts for contributions over \$250
- **Vehicles:** vehicle sales tax, personal property tax statement for each car you own, total miles driven for the year and/or total miles driven for business
- **Homeowners:** mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2023
- **Retirement/IRA:** amount contributed to an IRA and total value as of December 2023



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- Health care insurance policy from marketplace or other organization. **Please provide form 1095a, b, or c!!!**
- ITIN: if you need to apply for an [ITIN](#) for yourself or a family member.
- If you like **electric directly deposit** refund or tax payment, please provide a void check to me.
- Any estimate tax prepaid copy.

### **Step3: Gather detail information from IRA (Optional)**

Are you expecting any other tax documents besides what has already been provided to us? To ensure you provided all your 2023 tax documents, please use the link below to obtain your 2023 Wage and Income Transcript/Tax records. You can download and print your transcript immediately or request the transcript be mailed to your address on record. Please provide us with a copy once obtained/received.

<http://www.irs.gov/Individuals/Get-Transcript>

You may also use the link to get a record of your past tax returns, also referred to as tax return transcripts.

### **Step 4: Upload file or email to us.**

You can email your document to us or drop to a security account at:

<https://www.liutaxgroup.com/sharefile-client-portal/>

### **Step 5: After tax return, keep copies of your forms and tax statements**

For your protection, keep any forms used to prepare your taxes and a copy of your return for seven years. This information will make it easier to file your taxes next year.

### **Step 6. Payment**

1. You can make a directly payment from invoice we send to you or Zelle at:  
[LiuTaxgroup@gmail.com](mailto:LiuTaxgroup@gmail.com).

Please contact with us any time if you have any questions. We will be on your side.

Hope you and your family success in 2023!

Bonnie Liu, EA

Liu Tax Group Inc