



1330 Flint Meadow Dr
Kaysville, UT 84037
801-928-9642

Returning Client Checklist

Thank you for choosing Sandberg Tax Service, LLC to prepare your tax returns. I require the following items for you to bring to our scheduled appointment:

___ Driver's licenses or other state picture ID (for both spouses if married or for taxpayer if single) if your license was renewed since our last appointment.

___ All of your important tax documents for 2023: W-2s, 1098 mortgage interest, 1099-Interest statements if over \$10, 1099-B, 1099-DIV Brokerage statements if you have stock market investments, cryptocurrency statements if you sold cryptos, 1099-R if receiving a pension or if you withdrew money from a retirement account, 401K or IRA, 1098-T if you or a member of your family paid tuition and attended a college or trade school, 1098-E if you paid student loan interest, etc.

___ If you sold any cryptocurrency like Bitcoin, Ethereum, Cardano, etc. during 2023, you must provide me a statement showing your cost when you purchased, and sale price when you sold.

___ I want to ensure I have performed my due diligence requirements with the IRS and have copies of all required documents on file for my clients or I can be heavily fined. If you had a new child during 2023 or are claiming a child you did not claim previously, I need to see proof of their identity (birth certificate and Social Security cards) and proof they lived with you for over six months such as school records, health insurance records, library cards, statements with their names on them, dental/doctor statements, etc.).

___ Proof of Healthcare.Gov insurance. I need to see your 1095-A if you had an insurance contract through the Healthcare.gov marketplace. You may also bring your 1095-B or 1095-C from your employer or insurance company if your dependents are listed on the form, but it's not absolutely necessary. It provides me another document for my due diligence.

___ If you are unmarried (or lived apart from your spouse the last six months of the tax year) and one or more dependents lived with you for over half of the tax year, and you paid over half the cost of keeping up a home for the dependent, you may qualify for Head of Household filing status. This is a lower tax rate than the single status. I require proof that you kept up a home for at least six months for the dependent: rent receipts, mortgage interest statements (Form 1098), real estate taxes, home owner's insurance, home maintenance and repairs, utility bills, etc. (Clothing, education, and medical treatment are not included in the cost of keeping up the home).

___ If you bought and/or sold a home during the tax year, The sale must be reported on your tax return. I must see the title company closing papers on the purchase and sale of the home you sold, and the purchase title papers of the home you bought. If you no longer have the closing papers on the purchase of the home you sold, you need to inform me of what you paid for the home, what date you purchased it and the cost of capital improvements (things that would increase the value) to the property while you lived in the home.

The more you prepare before our appointment, the more accurate your tax return will be, so please help us both and come prepared.

Directions to my office are located on www.sandbergtax.com.