

# Dave Jones Accounting Services

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Deducting The Stress Out of Taxes

January 2, 2024

## Dear Tax Client:

We are excited to assist in your tax preparation. The 2023 tax year includes a few changes. Our annual tax reminder checklist is below, but it is highly recommended to read through the [tax questionnaire](#) to ensure all tax information is accounted for.

### Tax items needed:

\_\_\_ Wages (W-2)                      \_\_\_ Interest Income (1099-Int)                      \_\_\_ Dividend Income (1099-Div)  
\_\_\_ State Refunds (1099-G)                      \_\_\_ Non Employee (1099-NEC)                      \_\_\_ IRA Contributions  
\_\_\_ Unemployment Comp                      \_\_\_ Social Security (1099-SSA)                      \_\_\_ College Expenses (1098-T)  
\_\_\_ Stock Sales (1099-B)                      \_\_\_ Retirement Income (1099-R)                      \_\_\_ Partnership/S-Corp Income (K-1)  
\_\_\_ **Health Insurance Forms (1095-A) (You must provide this document if you had Obamacare/Marketplace)**  
\_\_\_ Settlement Statements from refinance/purchase of Home

### Tax Information needed:

Please indicate if there was a change in Marital Status: \_\_\_\_\_  
Children/Dependents (write in any additions during 2023):  
Full Name: \_\_\_\_\_ Social Sec #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Medical Expenses (Premiums, Prescriptions, Doctors, Dentists, Eye care, etc.): \_\_\_\_\_  
(Please note that expenses must exceed 7.5% of income in order to be deductible) Medical Miles: \_\_\_\_\_  
State Taxes Paid: \_\_\_\_\_ Sales Tax on Large Purchases (Car, RV, etc.): \_\_\_\_\_  
Real Estate Taxes: \_\_\_\_\_ Mortgage Interest: \_\_\_\_\_ PMI: \_\_\_\_\_  
Charitable Contributions: \_\_\_\_\_ Charitable Miles: \_\_\_\_\_ Noncash Donations: \_\_\_\_\_  
Job Expenses (Unreimbursed expenses): No longer deductible.  
Business Income/Expenses (attach separate sheets)

Direct Deposit is available for your refunds. (The same as last year: YES/NO (if the same I will not need this info)

Bank/Credit Union \_\_\_\_\_ Routing Number \_\_\_\_\_ Acct # \_\_\_\_\_  
Checking or Savings \_\_\_\_\_

**Please note that LLC's and SCorps have to be filed by March 15. Personal Tax Returns are due April 15. An extension may be filed for businesses or personal tax returns which gives you an additional 6 months to file your return (however payments need to be made by April 15 or a penalty will apply).**

All of the above information may not apply to you. Please use the online scheduler to book a sit-down appointment.

**Hours:** I am available January 16th to April 15th from 9:00am-6:00pm Monday thru Saturday (not Sunday; please do not call or come by on Sunday). You can schedule your tax appointment online at [www.davejonestax.com](http://www.davejonestax.com).

### Appointments:

We are holding in-person appointments at our Orem & Springville offices. We also offer virtual and phone appointments. You may upload your electronic tax documents to your Online Folder: [Client Portal](#) created for you. Email or call us if you do not already have one and we can create one for you. We do have a secure box at the front door where you can drop off your tax documents.

Thank you,

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