



Dave Jones Accounting Services

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Deducting The Stress Out of Taxes

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January 2nd, 2024

Dear Tax Client:

We are excited to assist in your tax preparation. The 2023 tax year includes some changes. Our annual tax reminder checklist is below, but it is highly recommended to read through the 2023 Tax Questionnaire to ensure all tax information is accounted for.

Tax items needed:

<input type="checkbox"/> Wages (W-2)	<input type="checkbox"/> Interest Income (1099-Int)	<input type="checkbox"/> Dividend Income (1099-Div)
<input type="checkbox"/> State Refunds (1099-G)	<input type="checkbox"/> Non Employee (1099-NEC)	<input type="checkbox"/> IRA Contributions
<input type="checkbox"/> Unemployment Comp	<input type="checkbox"/> Social Security (1099-SSA)	<input type="checkbox"/> College Expenses (1098-T)
<input type="checkbox"/> Stock Sales (1099-B)	<input type="checkbox"/> Retirement Income (1099-R)	<input type="checkbox"/> Partnership/S-Corp Income (K-1)
<input type="checkbox"/> Health Insurance Forms (1095-A) (You must provide this document if you had Obamacare/Marketplace)		
<input type="checkbox"/> 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 2021):

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: We are available January 16th to April 15th from 9:00am-6:00pm Monday through Saturday (not Sunday; please do not call or come by on Sunday). You can schedule your tax appointment online at 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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