



# INDIVIDUAL INCOME TAX PREPARATION CHECKLIST

## Things to keep in mind:

If you had health insurance you will receive a 1095A, 1095B or 1095C. **If you, your spouse or dependent(s) received health insurance through the MarketPlace (ObamaCare) you are required to file and must have your 1095A.**

*You have until 4/18/23 to establish 2022 IRAs.*

Social Security number and date of birth are required for all individuals listed on your tax return.

**(New clients need to provide Social Security Cards prior to filing)**

## In 2022, did you (or your spouse) receive income from any of the following:

- Wages – **W2(s)**
- Interest or Dividends – **1099 Div or Int**
- Retirement or IRA Distribution – **1099 R**
- Partnership or S-Corporation – **K1(s)**
- Unemployment – **1099 G**
- State Income Tax Refund
- Alimony
- Social Security Benefits – **1099 SSA**
- Operating a Business or Farm /Self Employment
- Own or receive income from rental property
- Have gambling winnings and losses
- Receive any Digital Assets**
- Royalties – **K1(s) or 1099 Misc**
- Any Other Income – **1099 Misc/NEC/K**

## In 2022, did you (or your spouse) sell or dispose of any:

- Stocks, Mutual Funds or Bonds – **1099 B**
  - Digital Assets such as NFTs, Crypto Currency, etc.**
  - Personal Residence – **Closing Statement**
  - Rental Property or Other Personal Property
- If so, are you receiving installments payments?

## In 2022, did you (or your spouse):

- Contribute to an IRA, SEP, or Keogh Plan
- Have a foreign bank or securities account
- Pay interest on student loans
- Pay for post-secondary education – **1098 T**
- Have a home mortgage, a second mortgage or a home equity loan – **1098**
- Pay real estate taxes – **Tax Statement or 1098**
- Pay medical expenses and/or private health or Long-Term Care insurance premiums
- Make contributions to a charity or church
- \$499+ in non-cash items must be documented
- Suffer a casualty loss in a federally declared disaster area
- Receive an inheritance
- Pay alimony
- Pay child or dependent care expenses
- Send payments to IRS for 2022 taxes
- Cash in a Life Insurance Policy or Annuity
- Receive any letters or notices from the IRS
- Did you buy or refinance a personal residence in 2022?** (Closing Statement)
- Have **foreign assets** such as bank accounts, investments, business ownership, etc.

## IRS REQUIREMENTS

*You **must** be able to provide documentation proving the child(ren) listed on your Tax Return resided with you in 2022 order to claim EIC, Child Tax Credit and America Opportunity Tax Credit.*

## Acceptable documents include:

- School Records or Statement
- Landlord or property Management Statement
- Health Care Provider Statement
- Medical Records
- Child Care provider records
- Placement agency statement
- Social services records or statement

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