



LOS ANGELES X TAX SERVICES

INDIVIDUAL TAX PREP CHECKLIST

PERSONAL INFORMATION

- Taxpayers full name: SSN: DOB:
- Spouse full name: SSN: DOB:
- Current Address (Please provide details if you moved during the tax year)

- Filing Status (Single, Married Joint, Married Separate, Head of Household)
- Dependents (Name, SSN, DOB, did your dependent live with you all year?)

Full Name:	SSN:	DOB:
Full Name:	SSN:	DOB:
Full Name:	SSN:	DOB:

- Copy of your Driver’s License or current State issued ID (not a passport)
- If you are a new client: Provide copies of your previous 2 tax returns you have filed
- In 2023 did you or your spouse have any interest in or authority over any foreign account or trust? Yes No
- At any time during 2023, did you or your spouse receive (as a reward, award, or payment) or sell, exchange, give, or otherwise dispose of a digital asset (or any financial interest in a digital asset)? Yes No
- Did you have healthcare for the entire 2023 tax year? Yes No
 - How much did you pay in health insurance premiums?
 - If you were covered through a government exchange, provide Form 1095-A. (Covered California) you must include even if you did not receive a subsidy.
- Estimated Taxes Paid – provide date(s) paid, amount(s) and was it paid to Federal and/or State

Federal Estimated Taxes: Q1:	Q2:	Q3:	Q4:
_____ Estimated Taxes: Q1:	Q2	Q3:	Q4:
_____ Estimated Taxes: Q1:	Q2:	Q3:	Q4:
- Notices Received from IRS or State



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This list covers preparation items common to most filers; however, taxes are different for each taxpayer. Feel free to tailor the tax prep checklist to your situation.

INCOME

- W2s
- 1099s (INT/DIV/MISC/NEC)
- 1099-Retirement Distribution
- 1099-B Capital Gains/Sale of Stock/Brokerage Accounts
- 1099-SA Social Security Benefits
- 1099-G Unemployment Wages
- If you sold your home, provide initial purchase agreement and the sale closing statement
- Alimony received – include year of divorce
- Self Employed Income, including SMLLC (see expense worksheet provided)
- Rental Income (see rental expense worksheet provided)
- Trust or Estate Income (K1)
- Corporation and/or Partnership Income (K1)
- Foreign Income

ITEMIZED DEDUCTIONS

- 1098 – Mortgage Interest (include principal loan balance, points paid and the amount of line of credit, if any)
- Real Estate Taxes Paid
- DMV Registration
- Charitable Contributions – Cash and Noncash Donations (do not include crowdfunding or political donations)
- Medical Expenses (copays, prescriptions, dental)
- HSA Contributions or FSA through your employer (rollovers, if any)
- 1098-E Student Loan Interest

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- 1098-T Tuition and Fees for higher education
- Any IRA Contributions? (SEP, Traditional, ROTH or 401k, rollovers, if any)
- Foreign Taxes Paid
- Electric Vehicle (include VIN) or Solar Purchase (include amount)
- Unreimbursed Employee Expenses (for state use only); employer must be able to verify
- Investment Fees
- Childcare Expenses – Provide Tax ID, Name, Address, Phone Number and Amount Paid

SELF EMPLOYED/BUSINESS INCOME/SMLLC

- Name of Business, if any
- EIN, if any
- State that the business is registered in
- Prepare and send us your income and expenses choose one of the options:
 - Quickbooks Online/Quickbooks Self Employed
 - Make sure all transactions have been added from 1/1/2023 to 12/31/2023.
 - Make sure you have reconciled your bank accounts and credit card accounts.
 - Add us as your accountant by using info@emtaxservice.com
 - Send us an Excel Spreadsheet (if using numbers, please convert to excel)
 - This can be our spreadsheet or one that you have created, it must include
 - Totals of income and expenses
 - Send us an email detailing out total income and total expenses by category.

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Feel free to tailor the tax prep checklist to your situation.*