

LECHMAN & AMBROSE - INFORMATION CHECKLIST

Client: _____

Confirm Date of Birth Client 1 ___/___/___ Client 2 ___/___/___

Name: () ()

** I do not need your License # unless you had to renew in 2023. If you did, I will need the updated Issue and Expiration date. **

Drivers License or ID # () ()

D/L Date of Issuance () ()

D/L Date of Expiration () ()

Did you work from home during 2023 and have local tax withheld from the city where your office is located? NO YES

Did you move in 2023? No Yes _____

Did you change jobs in 2023? No Yes _____

Did you contribute to an IRA, HSA, or ROTH? No Yes _____

Did you have Health Insurance purchased from the "Marketplace" in 2023? No Yes

___ # of W-2's ___ # of 1099's detailing income received

Did you make improvements to your home that are energy efficient? If so, I will need receipts and proof of eligibility.

If you sold any stocks or shares of mutual funds and basis information is not provided by the broker, detail all activity in the stock or funds sold from original purchase date through date of sale (year-end summary statements are ideal)

Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)

Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans

Total of charitable contributions, and details for any non-cash contributions over \$250

Details include: Name of Charity, Date of Donation, FMV of donation, Actual purchase price and Description of items donated

If you opened or added to a 529 plan that qualifies for a state income tax deduction, please provide details

State: _____ Beneficiary: _____ \$: _____

If you had childcare expenses please provide all expenses paid for each child

If you have a child in college please provide all expenses paid by both parents and child

If you are claiming auto mileage as a deduction for (circle one)

business -- rental properties --

Type of vehicle _____ Date placed in Service ___/___/___

Personal Miles + Commuting Miles + Business Miles = Total Miles Driven in 2023

_____ + _____ + _____ = _____

If you bought, sold or refinanced real estate, enclose a closing statement for each transaction

Legal documents for divorce, separation decrees, child custody, or purchase or start up of a business

New clients: Copies of prior year federal, state and local returns and depreciation schedules if applicable (at least one year, preferably three years)