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Checklist

Here is a quick checklist for items needed for tax preparation:

- W-2 for wages
- W-2G for gambling
- 1099-Int for interest
- 1099-DIV for dividends
- 1099-B Brokerage
- SSA-1099 Social Security
- 1099-NEC for income
- 1099-Misc for income
- 1099-K for income
- 1099-R for retirement
- 1098-T for tuition
- 1099-SA for HSA's
- 1099-Int for mortgages
- 1099-G for refunds & unemployment
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2023
- K-1 forms from investments in S corporations or partnerships
- Childcare costs, and the name, address, amount, and ID # of the recipient
- Charitable donations-total amounts and recipients (you can get a deduction on Colo even if you take the standard deduction on the Federal return)
- Property tax paid on your home, property, or cars.
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities.

If you have a small business or rental property, I can provide you with a separate checklist for those activities if needed.