**Superior Tax Service**



***Honest, professional tax service at an affordable price***

**TAX RETURN CHECKLIST: TAX YEAR 2023**

**Personal & Family Information**

|  |  |
| --- | --- |
|  | Social Security Number(s) or ITIN(s) • Yourself, spouse and qualifying dependents |
|  | Full name(s) and date(s) of birth • Yourself, spouse and qualifying dependents |

**Tax Forms** (Yourself and Spouse)

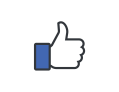
|  |  |
| --- | --- |
|  | W-2 and 1099-NEC Forms |
|  | Self-Employment Income: Revenue & Expenses\* |
|  | Rental Property Income: Revenue & Expenses\* |
|  | 1099-K, Unemployment (1099-G), Cryptocurrency Transactions (1099-B)\* |
|  | Savings & Investments (1099-INT, 1099-OID, 1099-DIV)\* |
|  | Retirement Income/Social Security Benefits (1099-R, 1099 SSA, RRB-1099)\* |

**\*If Applicable**

**IMPORTANT 2024 DATES**

**Date**

|  |  |
| --- | --- |
| Jan. 31, 2024 | Last day to send W-2 forms to employees |
| Last day to send 1099-NEC forms to sub-contractors |
| Mar. 15, 2024 | File partnerships & corporate tax returns |
| Request an extension to file (Partnerships & Corporate) |
| Apr. 15, 2024 | File individual tax returns |
| Pay taxes and request an extension to file (Individual) |

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