Franklin P. Sparkman, Jr., CPA, PA

Certified Public Accountant

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Dear Friends:

Tax time is here and 2023 is over! We hope you had a very Merry Christmas and a Happy New Year and that your families are all healthy. This organizer has been prepared to assist you in gathering information to prepare your tax return for 2023.
. Please review the entire organizer and answer the questions that apply to **you**.

If you are doing things by phone either upload your documents 2 days before your appointment or drop them by the office so we can be ready. If you prefer to mail in your documents, please send us copies and keep your originals for your records.

Just an FYI we will be texting you, your appointment time and to confirm and to remind you. They will come from 704-703-6894. **We are not sending out reminder cards this year. Everything will be electronic.**

If we do not already have them on file, we will be asking for copies of birth certificates and SS cards of your dependents.

Our checklist includes a summary of items which qualify as either itemized deductions or tax credits. You may enter your information on this sheet or use it as a guide in presenting your information. Although tax reform will result in several clients being unable to itemize, we still encourage all clients to include information as they have in the past to ensure we have explored all tax saving opportunities for both federal and state purposes. We have also included a tax information questionnaire with this letter that we ask all clients to complete. The questionnaire will help us identify changes and tax saving opportunities for you.

We have prescheduled appointments for you based on the time you came in last year. If you do not receive a text, please do not hesitate to call our office.

We look forward to serving you this year and look forward to seeing you soon!

Best Regards,

Franklin P. Sparkman, Jr.

*****Our Waxhaw address is: 604 Old Providence Road, Waxhaw, NC 28173*****

*****Our Lancaster address is: 300 North Catawba Street, Lancaster, SC 29720 ****

Please call our office if you need directions.

Tax Information Questionnaire – Please complete and return with your tax information

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	Yes	No
Did your marital status change during the year?	☐	☐
If yes, nature of change: ______ Divorced ______ Married ______ Widowed		
Did your address change from last year?	☐	☐
Were there any changes in dependents from the prior year?	☐	☐
If yes, explain: ____		
Did you purchase a new or used energy-efficient hybrid, or electric car, truck, or van?	☐	☐
Did you make any energy-efficient improvements to your home? If Yes Provide Details.	☐	☐
Did you sell, exchange, or purchase any real estate during the year?	☐	☐
If yes, please include a copy of the real estate closing statements.		
Did you purchase gasoline or other fuels for off-highway use (e.g., farming)?	☐	☐
Did you cash or surrender any Series EE or I U.S. Savings Bonds issued after 1989?	☐	☐
If yes, did you use any of the proceeds to pay for higher education expenses?	☐	☐
Have you made a withdrawal from a 529 plan or an IRA to pay for education expenses?	☐	☐
Do you have evidence to substantiate charitable contributions of $250 or more?	☐	☐
Are you a small business owner who has paid an unincorporated entity more than $600 for services or rent?	☐	☐

NC or SC Sales and Use Tax – The state of North & South Carolina collects sales tax on any out-of-state purchases of consumer goods that have been obtained by mail order. If you are liable for this consumer use tax, please provide us with the amount of goods purchased during 2023.
Amount Purchased ________________

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Tax Information Checklist

INCOME:

- 1095-A
- W-2's
- 1099-INT, Interest Statements
- 1099-DIV, Dividend Statements
- 1099-R, Retirement account distributions
- 1099-SSA, Social Security income
- 1099-G, State and Local tax refunds
- 1099-MISC, Miscellaneous income/Gambling (W2-G)
- 1099-B, Brokerage statements, Include cost basis information on any sale of investments
- 1099 HSA Health Savings Account showing amounts you spent or contributed to your HSA
- Unemployment compensation
- Alimony received
- K-1's from Partnerships, S Corporations, Trusts
- Other Sales of Investments
- Rental, Self Employed, Farm Income
  - Income – summarized by category
  - Expenses – summarized by category
  - Auto mileage and expenses (business portion)
  - List of equipment, furnishings, etc. purchased during the year
  - Detail on assets sold during year

EARNED INCOME CREDIT, DEPENDENTS CREDITS AND HEAD OF HOUSEHOLD STATUS:

- In order to combat tax fraud, the IRS is now requiring that paid tax preparers retain written proof that dependents reside with the taxpayer(s) claiming the earned income credit. Acceptable proof includes a birth certificate, school records, insurance records, childcare records, or medical records.

ADJUSTMENTS TO INCOME:

- Un- reimbursed job expenses for teachers (grades K-12) ($300 Max) Amount ($) _____________
- Regular IRA or SEP contributions. Amount Contributed:
  Taxpayer _________________ Spouse ________________
- Self-employed health insurance Amount paid __________________________
- Alimony Paid:
  Recipient's name____________________________
  Social Security Number______________________
  Amount Paid________________________________
- Student loan interest. Bring Form 1098-E

- Tuition expenses for taxpayers of dependents. **Form 1098-T must be provided** in order to claim education credits. _____________

DEDUCTIONS:
Medical:

- Health insurance premiums paid with after tax dollars. (DO NOT include Medicare premiums which we obtain from form 1099-SSA) Amount Paid ___________________________
- Long-term care insurance premium payments
  Taxpayer _____________ Spouse _________________
- Medical expenses (out of pocket)
  Prescriptions ________________________________
  Doctors and Dentists __________________________
  Other Medical _______________________________
  Medical Mileage _____________________________

Taxes:

- County/City Taxes. Amount Paid
  Real Estate ___________________________________
  Automobiles__________________________________
  (This tax is paid with the renewal of your tag)
- Sales Tax Deduction: (Motor Vehicle, Boat, Home or Home Building Supplies)
  Amount Paid _________________________________

Mortgage Interest on Home Acquisition Debt:

- Home equity line interests for proceeds used to buy, build or improve your home ONLY
- Home mortgage interest, points and mortgage insurance premiums. Include all 1098 Forms.

Contributions:

- **Charitable Contributions** – provide only those that are documented with a canceled check or receipt. For a gift of more than $250 at one time, written acknowledgment from the charity must be obtained.
  ____
- For a contribution of items in which you wish to claim more than $500, please provide details of the items and their fair market value. ________________________________

Childcare Credit:

- Child Care Expenses Paid ____________________________________
  Provider's name _____________________________________
  Provider's address _____________________________________
  Provider's tax ID number _______________________________