

☐ 1. If your tax return was not prepared by Burlington Business Solutions LLC you must must provide the following:
Please provide a copy of 2022 Tax Return and Social Security Cards.
All clients must bring Driver Licenses

☐ 2. Please Provide Contact Number and Email Address:

3	Name	Social Security #	Date of Birth
	TaxPayer		
	Spouse		
	Child		
	Child		

☐ 4. Occupation

Taxpayer
Spouse

☐ 5. Day Care Provider

Name
Address
Federal ID#

☐ 6. Did you ,your spouse or dependent take any higher education courses in 2023?

Please provide 1098T

☐ 7. E-file information: Bank Name

9 Digit Routing #
Account #

☐ 8. All W2's for both taxpayer and spouse

☐ 9. Did taxpayer or spouse receive any funds from a pension or Annuity? (1099-R)

☐ 10. Did you receive a State Refund for 2022?

☐ 11. All 1099INT and 1099DIV for Interest/Dividends

☐ 12. Did taxpayer or spouse collect unemployment in 2023?
(This form will no longer be mailed- please print off State of NJ Website 1099 G)

☐ 13. Did taxpayer or spouse receive any social security benefits in 2023?
(If YES bring SSA-1099)

☐ 14. Does taxpayer or spouse have any business on the side?
(If you accept any electronic payments please bring in 1099-K) PayPal Facebook Market Place Venmo etc. over \$600.00.

☐ 15. If you have a business do you use a room in your home for an office?(only for Schedule C or 1099 Contractors)

Square footage of entire house:
Square Footage of the room used for office:
Total Utilities paid in 2023:
Homeowners insurance paid in 2023:

☐ 16. Do you own rental properties?

(If YES bring all rental information) All Rental owners are required to issue 1099's for service work.

☐ 17. Are you a partner in a business or do you have any affiliation with a corporation?
(If Yes bring K-1)

☐ 18. At any time during 2023 did you:(a) receive(as a reward, award, or payment for property or services);or (b) sell,exchange, gift, or otherwise dispose of a digital asset (or financial interest in digital asset)?
(If yes bring 1099B, Must have original purchase date, original purchase price, date of sale price for each transaction sheet.)

19. Did you buy/sell your home? (Bring Original settlement sheet from the purchase of the home just sold. Bring a list of any improvements and cost made over the years you owned your home.)
20. Did you have any gambling winnings? (If Yes bring all W-2G's)
21. Medical Expenses: Doctors, Dentists, Pediatricians, etc.(1095A, 1095B or 1095C) Pharmacy, Medical supplies, and insurance costs. Please bring form 1095A for Market Insurance. Healthcare cost, if you paid more than 50% for healthcare credit. Do you have health care coverage?
22. Do you own your home? Mortgage Interest: Real Estate Taxes: PMI: Foreclosure/Bankruptcy: Home Equity Loans
23. Any out of state purchases? These items are subject to NJ USE TAX.
24. Contributions or donations in the form of cash or check? Recipient: Amount: Recipient: Amount:
25. Contributions or donations in the form of food, clothes, household items, Etc.? Recipient: Amount: Recipient: Amount:
26. Did you make any estimated tax payments for the year 2023?
27. If you are a renter, what is the total rent paid in 2023?
28. If you have been a victim of tax scam and reported it to the IRS you MUST BRING YOUR PIN to E-file your 2023 tax return.
29. Please bring a copy of DD214 for Veterans exemptions (Only for veterans that did not apply previous) You do not have to reapply each year. NJ Deduction has a 6500 for 2023
30. Did you have any Foreign Income for 2023?
31. Residential Renewable Energy Tax Credit (Solar, Wind,Geothermal, and Fuel-cell Technology)
32. New electric car tax credit upto \$7500.00 (Income Limitation Single 150,000 Jointly 300,000)

For NJ Taxpayers who do not have health insurance please apply for a exemption:
<https://nj.gov/treasury/njhealthinsurancemandate/exemptions.shtml>

PROPERTY TAX REDUCTION:

Senior Freeze (Can be filed on line)

NJ Anchor for Homeowners and Renters (Can be filed on line)

Please remember that Etsy, Vemo, Zelle, Craigs List, etc will be issuing 1099K for 2023 sales over \$600.00