



HARTMAN, BLITCH & GARTSIDE

CERTIFIED PUBLIC ACCOUNTANTS

904.396.9802 | hbg@HBGcpa.com | www.HBGcpa.com

Reach us soon on the HBG app from Liscio

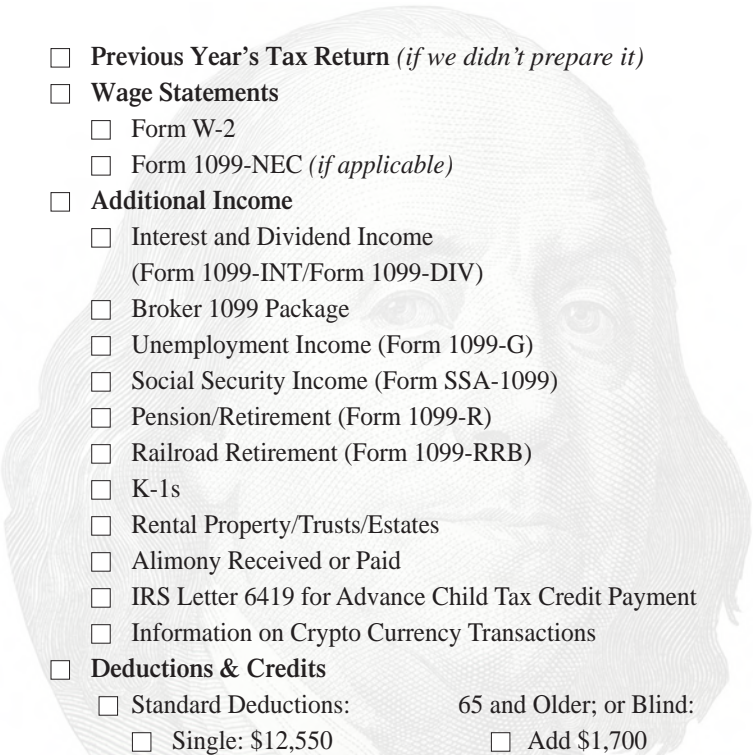
2022 TAX SEASON CHECKLIST FOR BUSINESSES

- ☐ **Previous Year's Tax Return** *(if we didn't prepare it)*
- ☐ **Financial Business Reports:**
 - ☐ Profit and loss statement
 - ☐ Balance sheet including assets & liabilities
 - ☐ General ledger details
 - ☐ 1099s received
 - ☐ Info on ERT, PPP, EIDL and any other federal/state/local/COVID/pandemic assistance
- ☐ **Asset Information**
 - ☐ Receipts, documents or reports related to your assets & fixed assets you've bought, sold or depreciated during last year
- ☐ **Loan Information**
 - ☐ New Loan agreement(s)
 - ☐ Loan statements as of the end of the year
- ☐ **Statements Supporting Financials**
 - ☐ Bank statements
 - ☐ Credit card statements
 - ☐ 1098 mortgage interest & property taxes form
- ☐ **Other Deductible Expense Information**
 - ☐ Home office deduction
 - ☐ Mileage log (if vehicle used for business)
 - ☐ Donations
- ☐ **Payroll data**
 - ☐ Copies of employees' W-2s, W-3s and 1099-NEC
- ☐ **Ownership Changes**
 - ☐ Provide name, social security number, and address of any new owners and effective date
 - ☐ Provide date any owner had a change in ownership percentage

JACKSONVILLE
6817 Southpoint Pkwy.
Ste. 2303
Jacksonville, FL 32216

BEACHES
427 3rd St. N.
Jax Beach, FL 32250

PERSONAL TAX CHECKLIST

- 
- ☐ **Previous Year's Tax Return** (*if we didn't prepare it*)
 - ☐ **Wage Statements**
 - ☐ Form W-2
 - ☐ Form 1099-NEC (*if applicable*)
 - ☐ **Additional Income**
 - ☐ Interest and Dividend Income
(Form 1099-INT/Form 1099-DIV)
 - ☐ Broker 1099 Package
 - ☐ Unemployment Income (Form 1099-G)
 - ☐ Social Security Income (Form SSA-1099)
 - ☐ Pension/Retirement (Form 1099-R)
 - ☐ Railroad Retirement (Form 1099-RRB)
 - ☐ K-1s
 - ☐ Rental Property/Trusts/Estates
 - ☐ Alimony Received or Paid
 - ☐ IRS Letter 6419 for Advance Child Tax Credit Payment
 - ☐ Information on Crypto Currency Transactions
 - ☐ **Deductions & Credits**
 - ☐ Standard Deductions: 65 and Older; or Blind:
 - ☐ Single: \$12,550 ☐ Add \$1,700
 - ☐ Married (joint): \$25,100 ☐ Add \$1,350
 - ☐ Head of Household: \$18,800 ☐ Add \$1,700
 - ☐ Mortgage or Home Equity Loan Interest Paid (Form 1098)
 - ☐ Real Estate & Personal Property Taxes Paid (Form 1098)
 - ☐ Medical, Eye Care and Dental Expenses
 - ☐ Charitable Deductions
 - ☐ Casualty/Theft Losses
 - ☐ Rental Property Expenses
 - ☐ IRA/Health Savings Account (HSA) Contributions
 - ☐ Childcare Expenses/Tuition & Education Fees (Form 1098-T)
 - ☐ Health Insurance (Form 1095 A-C)
 - ☐ **State Income Tax Refund Amount** (*if applicable*)
 - ☐ **Record of Purchase/Sale of Residence**

Start Early!

Give us documents early: February is best; first half of March is fine; April likely means filing an extension.



HARTMAN, BLITCH & GARTSIDE
CERTIFIED PUBLIC ACCOUNTANTS