

Items Potentially Needed for Extension (some may not apply)

- Form(s) W-2 (wages, etc.)
 - Form(s) 1099 (interest, dividends, stock sales, unemployment comp., retirement distributions etc.)
 - Schedule(s) K-1 (from partnerships, limited liability companies, estates, trusts, S corporations, etc.). If K-1's have not been received please provide me with an estimate(s) of taxable income for each entity.
 - Form(s) 1098 (mortgage interest) and property tax statements
 - Closing/escrow statements from sale(s) of real estate (sometimes referred to as HUD-1)
 - Forms 1095-A & if health insurance coverage was purchased through Covered California.
 - Profit and loss statements or an estimate of business profit.
 - List of estimated payments made to the IRS & CA for 2022 (normally paid with Forms 1040-ES & 540-ES. List amounts paid and dates paid.
 - Any purchases that generated credits (e.g. solar & electric vehicles)? If so, what were the dollar amounts spent on solar or which vehicle did you purchase?
 - All other supporting documents you feel may be needed
- * If next year's taxes will be dramatically different, please let me know what is changing so I can prepare 2023 estimates in line with your estimated 2023 income.

- If you are a new client please send me your prior year's Federal & State returns.

- **Documents can be uploaded to the link on my site below:**

- www.wehnercpa.com/upload

*****Please note if information is not provided I will assume your income, deductions, withholdings & credits are similar to the prior year*****