## **PASADENA TAX SERVICES**

VERIFICATION OF TAX YEAR 2023 &/or \_\_\_\_\_ DATA PROVIDED

PLEASE SIGN THIS FORM AND RETURN IT WITH YOUR TAX DOCUMENTS

(**Note: No tax returns will be released without this signed form.**

My Dear Friends,

As usual, please read this page, respond to the questions and sign it. I apologize for the inconvenience, but the IRS requires confirmation of these issues. Please be sure you BOTH sign this (if married). If not, your return will be delayed. If you are coming in, please be sure to bring this with you, (signed by your mate, if coming in alone.)

**This confirms that all the data entered here and into any organizer, including information on notes, attachments, additional worksheets and schedules, are true to the best of my (our) knowledge.**

At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in ANY VIRTUAL CURRENCY? YES\_\_\_ NO \_\_\_

***All* W-2’s and 1099s reflecting my income are reported.** They are correct and complete, except as noted. **Income from all sources**, domestic and worldwide, has been reported. All income received in cash or via barter or trades.

I/we have supporting records for mileage, business expenses, charitable contributions of $250 or more, as well as all other expenses claimed.

**PLEASE MARK \_\_\_\_Yes, or \_\_\_ No:** We employed household help in 2023. Household help = child or dependent care providers, tutors, housekeepers, gardeners, companions, etc. If they were paid at least $2,000 for the year, you **must** report the earnings and file the **W-2s and related payroll tax returns**. **(DEADLINE –filed to SSA by January 31st)**

**ð Did you pay anyone $600** or more for services performed in the course of business? You must send THEM 1099s ASAP. **(DEADLINE - File with IRS by January 31st)** This includes attorneys, part-time help, landlords, rental property folks, commissions paid. Not sending them out will cost you the deduction for the expenses, if audited. (**Do you want us to prepare the 1099s? IF too late now-Then remember for NEXT (this) year.**

**ð Business Assets –** I have made individual purchases of business assets over $1,000 and can provide ALL receipts.

**ð Earned Income Credit (EIC)** - if you are eligible for the EIC, you certify the following: The child(ren) in question is (are) your legal dependent(s). You are not filing a fraudulent Head of Household return while you are married. Your child(ren) is (are) legal resident(s) of the United States. You are not collecting AFDC. Nobody else is claiming you or your child(ren)n as dependent.(s).

**ð Assets outside the US.** I had financial accounts outside the U.S. that had a balance of $10,000 or more for even a minute during 2023. ***&/or*** I have assets outside the United States with a fair market value of $100,000 or more at the end of 2023 OR $150,000 or more during 2023 if filing jointly ($50,000/$75,000 if single). **FinCEN Form 114** must be filed **electronically** by **DEADLINES** **04/15/2024 or with extension by 10/15/2024**. The FATCA (8938) form is also filed with your personal return. Penalties for failure to file Start at $10,000, up to 100% of the accounts.

**IMPORTANT! Health Insurance Coverage:**

**PLEASE MARK \_\_\_\_Yes: Everyone including dependents were covered ALL Year) and YES IF \_\_\_\_Premium Health INS Form 1095-A was also received and included for coverage.**

**If you receive any of the following Health Coverage Forms (1095-A, 1095-B or 1095-C) please attach.**

**ð** I own rental real estate. Number of days Personal Use: \_\_\_\_\_\_\_\_\_ Fair Rental Days:\_\_\_\_\_\_\_

**ð** I have started a new business in 2023 and will provide you with the set-up documents and employer ID information.  
**ð** My estimated payments exceed $20,000/year. Help me set up an IRS EFTPS account to make deposits.

**ð** I am a Registered Domestic Partner in (State)\_\_\_\_\_ I must file a joint State return with my partner.

**Total cost of 2023 purchases made online or out of state or withOUT paying sales tax. This must be reported on your State tax return.** For State Return **$\_\_\_\_\_\_\_ or Please mark \_\_\_ No, if none.**

**Note: There are IRS changes all year affecting your tax returns. Be prepared to ASK me to file an extension AND PAY forward with your bank account info an estimated Tax by 4/15/2024. And Contact me by 3/20/24 to do this so the IRS rules are maintained: Income Tax paid AS you Earn your income, it’s penalized after 4/15/24. My Bank Account numbers have changed \_\_\_\_YES! \_\_\_\_\_No.**

Date **Your Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Your Spouse’s Signature** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Print** **Name** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_