



Integrated Tax Consultants, LLC

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Reportable Virtual Currency Transactions on your Individual Tax Return

To ensure we have the detail needed related to your activity with virtual (crypto) currency, please take a moment complete the following checklist.

Did you do any of the following with virtual currency in tax year 2023?

- Purchase? Yes No
- Receive? Yes No
- Sell? Yes No
- Spend? Yes No
- Trade? Yes No
- Mine? Yes No
 - If yes, did you receive a 1099-NEC? Yes No

If you have not already done so, please provide a transaction report from your cryptocurrency exchange platform(s), including all buys, sells, and exchanges of cryptocurrency in your account.

If all your cryptocurrency transactions occur on one exchange, gathering the information you need to report transactions on your tax return should be relatively easy. If you have cryptocurrency transactions on several exchanges you will need to download this report from each exchange and provide it to us.

Please upload these documents through your secure ShareFile folder by going to www.itctaxes.com, clicking "Client Portal" and signing in.

Name: _____ Date: _____