KEVIN A. CARESTIA, CPA LLC

NJ Resident Working in New York Checklist

2026 tax year · NJ-1040 and New York nonresident return

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Name _____ Employer and office location _____

WAGES AND PAY

- ☐ All W-2s, including every state line (boxes 15 to 17) and box 14 items (NY PFL, NJ SDI/FLI)
- ☐ Final pay stub of the year, if a W-2 looks off
- ☐ Bonus, commission and severance statements
- ☐ RSU and stock option statements and vesting schedules

WHERE YOU WORKED

- ☐ Total working days for the year _____ days
- ☐ Days at a New York office _____ days
- ☐ Days working from home _____ days
- ☐ Days at an employer office outside New York (which state) _____ days
- ☐ Business travel and client site days outside New York (where and why) _____ days
- ☐ Vacation, holiday and sick days _____ days
- ☐ Calendar, badge records or travel log supporting the days above
- ☐ Employer letter or policy, if your employer requires you to work from home or assigns you to a New Jersey office

OTHER INCOME AND DEDUCTIONS

- ☐ 1099s: interest, dividends, brokerage, retirement
- ☐ Your spouse's W-2s, and where they work if it is New Jersey or another state
- ☐ Property tax bills and mortgage interest statement (Form 1098)
- ☐ Charitable donation receipts
- ☐ Estimated tax payments made to New Jersey or New York $ _____

PRIOR YEAR AND NOTICES

- ☐ Last year's federal, New York and New Jersey returns (new clients)
- ☐ Any letter from New York or New Jersey, including a days-worked questionnaire
- ☐ Dates of any move into or out of New York or New Jersey during the year

DAYS OUTSIDE NEW YORK

- ☐ Business trips, client sites and employer offices outside New York: dates, where and why

Dates	Where	Why

Fill in the day counts for the year, or check the box and send your calendar or log and we will count them. Upload through the client portal or leave it in our secure, locked drop-off box.