

# Tax Preparation Checklist

Gather all year-end income and necessary documents to avoid delays and helps to file a complete and accurate tax return.

What you should have before you file your 2024 tax return:

## ALL TAX FILERS

- |  |  |
|--|--|
| <input type="checkbox"/> Valid Unexpired ID                  | <input type="checkbox"/> ITIN if no SSN # (self/spouse & dependents in the U.S.)   |
| <input type="checkbox"/> SSN and DOB (yourself & dependents) | <input type="checkbox"/> Tax Forms (from IRS or Business Institutions)   |
| <input type="checkbox"/> Bank Account & Routing Number       | <input type="checkbox"/> Virtual Currency (Income & Records of Transactions)   |
| <input type="checkbox"/> Copy Of Last Year's Tax Return      | <input type="checkbox"/> IRS Letters <input type="checkbox"/> Proof of Address: Bill   |
| <input type="checkbox"/> W-2's From All Employers            | <input type="checkbox"/> Dependents (Medical Records: under 6; School Records: under 18, if in school; both with their Birth Certificate). |

## RESIDENTIAL PROPERTY OWNERS

- |   |   |
|---|---|
| <input type="checkbox"/> 1098 Form (mortgage interest)          | <input type="checkbox"/> Closing Documents If You Bought/Sold During The Year |
| <input type="checkbox"/> Receipt From Energy Efficient Upgrades |   |
| <input type="checkbox"/> Insurance Premiums                     |   |
| <input type="checkbox"/> Real Estate Taxes Paid                 |   |

## RENTAL PROPERTY OWNERS

- |  |  |
|--|--|
| <input type="checkbox"/> Rental Income             | <input type="checkbox"/> Mileage For Inspections & Repairs |
| <input type="checkbox"/> Receipt From All Expenses | <input type="checkbox"/> Mortgage Interest                 |
| <input type="checkbox"/> Insurance Premiums        |  |
| <input type="checkbox"/> Real Estate Taxes Paid    |  |

## BUSINESS OWNERS

- |   |   |
|---|---|
| <input type="checkbox"/> Tax ID (EIN number)                  | <input type="checkbox"/> Business Use of Home (if applicable)                 |
| <input type="checkbox"/> Business Income & Expense Statements | <input type="checkbox"/> 12/31 Bank Balance                                   |
| <input type="checkbox"/> List of Capital Assets & Equipment   | <input type="checkbox"/> Mileage Log: January to June & July to December 2022 |
| <input type="checkbox"/> Quarterly Taxes Paid                 | <input type="checkbox"/> 1096 Form  |

Every business must have its annual profit and loss sheet. This will not only make it easier for your accountant or tax preparer to prepare, but it will also give you as the owner an idea of your company's finances. Below is a link to get a completely FREE fillable Profit and Loss statement for your business as well as a Balance Sheet and classified expenses for your benefit.

<https://docs.google.com/spreadsheets/d/174jPafQpvMKFdpLxm9eRa7ApiUKEHhUCar8uv5dHcGE/edit#gid=2142699199>

In UNITED BOOKKEEPING & TAX SERVICES LLC we offer Bookkeeping Services tailored to your needs. Let us take care of your Bookkeeping!!

*flip* 

## OTHER

- |  |   |
|--|---|
| <input type="checkbox"/> Retirement Plan Contributions   | <input type="checkbox"/> Job Search & Moving Expenses |
| <input type="checkbox"/> Childcare Expenses              | <input type="checkbox"/> Educational Expenses         |
| <input type="checkbox"/> Sales Tax From Vehicle Purchase | <input type="checkbox"/> FEMA Assistance              |

Make sure your information on your IRS account is correct & updated. Link provided below.

<https://www.irs.gov/payments/your-online-account>

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We are Certifying Acceptance Agents and help transmit for W-7 for ITIN Application or Renewal and we send certified copies of your IDs so you don't have to worry about sending originals in the mail.

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Thank You

**Give Us A Review!!**



<https://g.page/r/CT5lvS9YU8JyEB0/review>

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### NEW FOR 2024 - TaxPass Mobile Site

Beginning with the 2023 Tax Season, the TaxPass Mobile App has been enhanced and is now the TaxPass Mobile Site. You no longer need to download a mobile app to your device to access all the great features and benefits of TaxPass. Now, you can access TaxPass from any web browser!!

The TaxPass Mobile Site allows you to start a return, provide personal information, and upload & submit your W-2s and other supporting documents within a matter of minutes – from any web browser and all in a secure environment that protects your important data.

Best of all, the information and source documents flow directly to your tax preparers software so your tax return gets to be completed quickly without you being present. Your tax preparer will send your completed tax return via Remote Signature for your final review and signature.

**LINK:** <https://www.taxpassapp.com/?taxpassid=VXVME0R1#/login>

**TaxPass ID: VXVME0R1**

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Call to set up an appointment. We also work virtually if you cannot make it to the office.

**UNITED**  
Bookkeeping & Tax Services LLC



**www.UnitedBTS.com**

### Contact:

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By Appointment ONLY

Hablamos Español