

# Documents

To get you started, the first step of the process is to begin collecting your required documents. Use the checklist provided below as a guide. Once you have all your documents you will then need to submit them along with your **\$250 non-refundable deposit** (If you haven't done so already).

## REQUIRED DOCUMENTS CHECKLIST

<input type="checkbox"/>	<b>Copies Of Last Two (2) Federal &amp; State Tax Returns</b>	If you don't have it, no worries. We will be sending in form 4506-T to request your transcripts.
<input type="checkbox"/>	<b>Driver's License Or State Identification</b>	If married filing jointly, you will need the same credentials for your spouse.
<input type="checkbox"/>	<b>Social Security Card</b>	If married filing jointly, you will need the same credentials for your spouse.
<input type="checkbox"/>	<b>W2's &amp; 1099's</b>	If married filing jointly, you will need the same credentials for your spouse.
<input type="checkbox"/>	<b>Dependents: Copies of Social Security Cards &amp; Date Of Birth Number of Dependents</b>	Only needed if claiming dependents.
<input type="checkbox"/>	<b>Pin Number Letter Previously Received From IRS</b>	This is only if the IRS has previously sent you PIN letters to file yearly. If you don't have one, don't worry about it.
<input type="checkbox"/>	<b>All Correspondence Letters Received From IRS</b>	I.e. Federal, local, and/or state entities, that you have received in regards to any owed taxes, liens, or informational contents.
<input type="checkbox"/>	<b>EIN Letters from IRS Pertaining To Each Of Your LLC'S</b>	
<input type="checkbox"/>	<b>All Articles Of Organization From Secretary Of State</b>	
<input type="checkbox"/>	<b>All Receipts, Trip Sheets, Invoices, Bank Statements, Etc.</b>	QuickBooks, Excel, P&L, Balance Sheet, Cash Flow Statement, etc.
<input type="checkbox"/>	<b>Copies of All Payroll documents</b>	i.e. 941's, W2's, 1099's, 1096's, etc.

## PANDEMIC INFORMATION

Due to the pandemic, some necessary questions need to be addressed.

**Did you receive both stimulus checks In 2020?**

- Yes If yes, what were both amount? \_\_\_\_\_  
 No

**During the pandemic, did you receive Unemployment, grants or loans?**

- Yes  
 No



ANOINTED & APPOINTED  
ACCOUNTING SERVICES INC.

(312) 837-7219 Phone (800) 616-4967 Fax  
General@anointedaccounting.com  
www.anointedaccounting.com