

# Taylor L.E.T.S. LTD

*"A Firm of Licensed Preparers"*

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## **TAX PREPARATION ITEMS: (PLEASE BRING, FAX, MAIL OR EMAIL TO OUR FIRM, PRIOR TO THE APPOINTMENT, TO ENSURE AN ACCURATE RETURN)**

1. SOCIAL SECURITY #'S FOR DEPENDENTS. (ALL)
2. W-2'S AND 1099'S. (ALL INCOME)
3. 1098'S - DIVIDEND STATEMENTS. (ALL)
4. CHILD CARE INFORMATION: PROVIDER'S EIN OR SS#, NAME, ADDRESS, AND PHONE #'S. (ALL)
5. MORTGAGE INTEREST STATEMENTS. (ALL)
6. AUTOMOBILE REGISTRATION AMOUNTS, NEW CAR PURCHASE SALES TAX RECEIPT. (ALL)
7. PROPERTY TAX STATEMENT, IF YOU OWN IT. (ALL)
8. COMPUTER EQUIPMENT: PC, LAPTOPS, PRINTERS, SCANNERS, DIGITAL CAMERA, HANDHELD, ISP INTERNET PROVIDER, ETC. (TOTALS ONLY)
9. WHEN A SALE OF STOCK OCCURS, WE NEED TO SEE YOUR PURCHASE RECORDS. (ALL)
10. RECORDS OF ANY MOVING EXPENSES, OVER 50 MILES, WORK RELATED. (ALL)
11. PURCHASE, SALE OR REFINANCE OF HOME: CLOSING, SETTLEMENT, GOOD FAITH ESTIMATE. (THESE ARE THE DIFFERENT EXAMPLES THAT ARE USED)
12. **NEW CLIENT:** BRING LAST YEAR'S TAX RETURN FOR OUR RECORDS. IF YOU WOULD LIKE TO HAVE YOUR PREVIOUS TAX RETURNS REVIEWED FOR POSSIBLE REFUND; THERE IS NO CHARGE TO REVIEW. **THERE IS A FEE IF WE AMEND THE RETURN.** PLEASE MAKE YOUR APPOINTMENT AFTER APRIL 15<sup>TH</sup>.
13. **NEW CLIENT:** AZ STATE REFUND AMOUNT FROM PREVIOUS TAX YEAR.
14. **NEW CLIENT:** AMOUNT PAID FOR TAX PREPARATION, PREVIOUS YEAR ONLY.
15. LAW ENFORCEMENT BUSINESS EXPENSE. (WORKSHEET PROVIDED)
16. MILEAGE RECORDS FOR BUSINESS USE. (WORKSHEET PROVIDED)
17. MEDICAL/DENTAL EXPENSES PAID FOR THE TAX YEAR, INCLUDING MILEAGE (RT) & TOTAL OF ALL RECEIPTS.
18. EDUCATION CREDITS (EXPENSES)
19. CHARITABLE CONTRIBUTIONS (CLOTHING, MONEY, CHURCH, ETC.) **\*\*CONTRIBUTION BOOKS ARE AVAILABLE TO PURCHASE, FROM OUR OFFICE\*\***
20. ESTIMATED TAX PAYMENTS - WE NEED TO SEE ALL PAYMENTS MADE, CHECK AMOUNT. WE ALSO NEED VERIFICATION OF TOTAL PAYMENTS MADE FOR YEARLY ESTIMATED TAX PAYMENTS. (CHECKS, MO, ETC)
21. IF YOU HAVE A BUSINESS, ALL SUPPORTING DOCUMENTS. (CHECKBOOKS, SCHEDULES, ACCOUNTING BACKUP FILES)
22. PLEASE BRING A VOIDED CHECK, IF YOU WANT YOUR REFUND DIRECTLY DEPOSITED INTO YOUR BANK ACCOUNT.
23. **OUT OF STATE CLIENTS:** PLEASE FAX, MAIL OR EMAIL ALL NECESSARY DOCUMENTS TO COMPLETE YOUR RETURN.
24. ENERGY SAVING HOME IMPROVEMENT RECEIPTS.
25. TAX NOTICES/COMMUNICATION RECEIVED FROM THE IRS OR OTHER TAXING AUTHORITIES, PLEASE BRING WITH YOU.
26. MAKE SURE WE HAVE YOUR CURRENT EMAIL ADDRESS & PHONE NUMBERS.
27. ANY ADDITIONAL INFORMATION OR DOCUMENTS THAT YOU BELIEVE WILL ASSIST YOUR TAX PREPARER.

**CALL EARLY TO SCHEDULE YOUR TAX APPOINTMENT!**