

Certified Tax Experts, Inc.

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Information needed from new clients:

Corporations:

- P&L Statement
- Balance Sheet
- If you have payroll, please provide the W3/W2 forms
- If you pay independent contractors, please provide 1099/1096 forms
- Articles Of Incorporation
- EIN Letter
- Any documents from IRS (from forms 8832 and/or 2553) stating the effective date on how the company is taxed
- Copy of previous year tax return (if applicable)

Personal taxes:

- Previous year tax return
- Copy of driver's license(s)
- W2 / Interest Income / 1099 / K1 forms
- Retirement contributions
- Broker statements providing details of capital gain transactions
- Forms 1098 and copies of real estate tax bills and mortgage interest
- Marketplace insurance 1095A form (if applicable)
- If claiming a child, and you share custody with someone else, please provide the court documents showing what tax years you can claim your child. We will not enter any information with the court documents.
- Dependents full name, date of birth and social security numbers
- If you expect a refund, please supply us with a copy of a voided check

If you sold property during the last tax year, we will need the closing statement when you originally purchased the property, closing statement on sale of the property and total amount spent in upgrades.