**Certified Tax Experts, Inc.**

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**Information needed from new clients:**

**Corporations:**

- P&L Statement
- Balance Sheet
- If you use a payroll service, please provide the W3/W2 forms
- If you have independent contractors, please provide the 1096/1099
- Articles Of Incorporation
- IRS Letter with EIN
- Copy of previous year tax return (if applicable)
- For LLC and Corporations how did you elect to be taxed?
    - If you filed 8832 form (changes LLC to C Corp/Partnership) for taxes
    - 2553 Form to elect to be taxed as S Corp and IRS acceptance letter stating that

**Personal taxes:**

- Last year's tax return
- W2 forms
- 1099 forms
- K1 from Partnerships, S corps, Estates or Trusts
- Information about contributions to a pension or other retirement plan
- Broker statements providing details of capital gains transactions
- Forms 1098 and copies of real estate tax bills and mortgage interest
- Legal documents pertaining to the sale or purchase of property
- If claiming a child, you share custody with someone else, please provide the court documents which state what tax years you can claim your child. We will not enter any information without the court documents.
- Clear copy of your driver's license
- If you expect a refund, please supply us with a copy of a voided check
- If you had health insurance thru the Marketplace, we need the 1095-A form

Please keep in mind other information may be needed to complete your tax return. We will let you know if this applies to you. Also, the tax invoice must be paid in full before we will efile your return.