

# Personal Tax Checklist



Hi there! We are thrilled to help you prepare to file your income tax return. Please complete the checklist below to start the process. **Ensure to fill every blank and checkmark every box that applies to you.** Having this information will make the process seamless. The form will also serve as a guide to gather the document needed to complete the process. If you have any questions related to this form feel free to contact our tax professionals at 941-257-9469. Thank you for choosing The Books Solution!

## Client information

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

Address: \_\_\_\_\_

Phone#: \_\_\_\_\_

Email Address: \_\_\_\_\_

Driver's License State: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Driver's License #: \_\_\_\_\_

Occupation: \_\_\_\_\_

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## Spouse Information if filing joint:

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

Address: \_\_\_\_\_

Phone#: \_\_\_\_\_

Email Address: \_\_\_\_\_

Driver's License State: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Driver's License #: \_\_\_\_\_

Occupation: \_\_\_\_\_

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# Personal Tax Checklist



## Dependent Information

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

Relationship: \_\_\_\_\_

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Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

Relationship: \_\_\_\_\_

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DOB: \_\_\_\_\_

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Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

Relationship: \_\_\_\_\_

# Personal Tax Checklist



## We will need...

Copy of Driver's License for you and spouse.

Copies of last year's tax return for you and spouse.

Proof of Income ( W2, 1099, Etc.)

*(If you have been a victim of identity theft, please provide IRS PIN letter.)*

***(Upload the documents through our website [www.thebookssolutoin.net](http://www.thebookssolutoin.net) or visit <https://www.encyro.com/thebookssolution> to upload your pictures or PDF documents through our Portal)***

## Information about your income

- W-2 forms for you and spouse.
- 1099- for you and spouse.
  - 1099-Misc.
  - 1099- NEC Non-Employee Compensation.
  - 1099-SSA for Social Security Benefits
  - 1099-G, Unemployment income
  - 1099-R form 8606 Payment from IRA or Ret. Plans
  - 1099- Int, -DIV, -B or K-1 for investment income
- Rental Property Income- Profit and loss statement.
- Capital Gain or losses. Traditional or Virtual trading.

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## Income Adjustments

- IRA Contributions, Individual, SEP, etc.
- Medical Savings Account Contributions (MSA)
- Health Insurance (Self- employed)
- Student loans Interest paid & Tuition paid
- Self-employed pension plans
- Health Insurance- Market Place ( From 1095A)

## Credits & Deductions

- Childcare cost. Document supporting provider's information.
- Education Expenses - College or University (Form 1098-T).
- Adoption Cost.
- Mortgage interest, (PMI) private mortgage insurance.
- Investment Interest Expenses.
- Home business expenses.
- Rental property expenses.

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**Bank Account # where you want the refund to be deposited.**

Bank Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

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Signing this form is a written declaration that any of the information provided to your tax preparer in the form of a document, written statement, or verbal statement is legitimate; and should be used to be submitted to the IRS on your behalf. Failure to comply may result in a crime and the taxpayer may be subject to criminal penalties under the Section 7206 of the Internal Revenue Code.

Taxpayer Signature

\_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Spouse

\_\_\_\_\_ Date: \_\_\_\_\_