
Superior Tax Advisors

Your Trusted Advisors

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TAX PREPARATION QUOTE CHECKLIST

Please completely fill in the checklist below. If an item doesn't pertain to you, check "NO". Once you have finished the checklist, submit it through the website here for your FREE quote. If we need any additional information, we will contact you with follow-up questions.

Personal Information - Please fill in the following information.

Taxpayer's full name:

Spouse's full name:

Number of dependents:

E-mail:

Phone:

State(s) lived in during 2020:

Which service are you interested in?

Income Tax Preparation

Tax Planning

Audit Support

Other: List type

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Income - Please check "YES" to any forms of income you received during the tax year.

Wages, salaries, tips, etc. (Form W-2)

Interest and Dividends (Forms 1099-INT and 1099-DIV)

IRA distributions, Pensions and annuities, and Social security benefits (Forms 1099-R, 1099-RRB, 1099-SSA)

Sale of real estate property

Capital gain or (loss) (Form 1099-B)

Cryptocurrency

Other investment income: List type

Business Income from sole proprietor (Schedule C) (Forms 1099-MISC and 1099-K)

Rental real estate

Royalties

K-1s from partnerships, S-Corporation, trusts, etc.

Farm income or (loss)

Unemployment compensation (Form 1099-G)

Other income. List type

YES	NO	QTY.
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
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<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

Deductions - Please check "YES" to any of the following deductions you had during the tax year.

Do you itemize your deductions (Schedule A)? (mortgage interest, real estate taxes, charity, medical, etc.)

Educator expense

Health savings account deduction

Moving expenses for members of the Armed Forces

Alimony paid

IRA contribution

Student loan interest paid

Tuition and fees paid

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Credits - Please check "YES" to any of the following that were paid during the tax year.

Foreign tax paid

Child and dependent care expenses

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Do you own a business?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If yes, what entity type of business owned? (check all that apply)

Corporation (Form 1120)

S-Corporation (Form 1120-S)

Partnership (Form 1065)

Estate and Trusts (Form 1041)

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Does the company have depreciable assets?

Does the company own real estate?

Does the company hold inventory?

Are accounting records (Profit/(Loss) Statement and Balance Sheet) available?

Are all tax filings up to date?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Any additional information you would like to add that we should know to give you an accurate quote:

of owners/partners during the year

QTY.
