2018 Tax Year Checklist – the Basics

Taxpayer Name:	
Full Mailing Address:	
Email Address:	Phone Number:
Date of Birth:	Occupation:
Reminder: Upload a Copy of your Driver's License and your Social Security Card!	
Were you sent an Identity Security PIN from the IRS? Please include that document!	

Joint Taxpayer Name:	
Full Mailing Address:	
Email Address:	Phone Number:
Date of Birth:	Occupation:
Reminder: Upload a Copy of your Driver's License and your Social Security Card!	
Were you sent an Identity Security PIN from the IRS? Please include that document!	

If You Receive A Refund, Where Would You Like It Sent?	
Name of Bank or Credit Union:	
Account #	Routing #
Is This A Checking or Savings Account?	

Your 2018 Filing Status:
___Single ____Married Filing Jointly ___Married Filing Separately ___Head of Household ___Widowed
Note: If you have Divorced, are claiming Head of Household, or Widowed during the 2018 year you need to provide all Spouse and Dependent information. If Widowed In 2018, please let me know to send additional instructions.

Dependents Name:	Dependent DOB:
Dependents Name:	Dependent DOB:
Dependents Name:	Dependent DOB:
Reminder: Upload a Photocopy of EVERY Dependent's Social Security Card and Include Birth Dates!	

Scans to Upload:

- ☐ Everyone's Birthdays – Children Plus Other Dependents
- ☐ Photocopy of Current Driver's Licenses of Taxpayer and Spouse (If Married In 2018, or Partner)
- ☐ Photocopy of All Social Security Cards for Taxpayer, Spouse, Children, and Other Dependents
- ☐ All W2s, All Types of 1099s, or Schedule K-1 Forms
- ☐ Proof of Healthcare
- ☐ All Personal Property Tax, Real Estate, and Mortgage Interest Year End Tax Reports
- ☐ State and Local Income Tax Amount Paid in Tax Year
- ☐ Records for Justification of Higher Education Costs and Childcare Costs
- ☐ Total Cost Related to Employment Not Reimbursed, Including: Travel, Dues, Uniforms, Etc.
- ☐ Total Cost of Health Care Insurance Amounts Paid in Each of Following Categories: Hospitals, Doctors, Dentists, Prescriptions
- ☐ Total Mileage Driven for Medical or Charitable Donations
- ☐ All Records of Contributions Toward Retirement, Such as IRAs
- ☐ All Records of Contributions Toward Healthcare, Such as HSAs

- ☐ Donations Made to Schools, Religious Organizations, and Other Charitable Institutions
- ☐ Income from Unemployment Income (If Any) and Costs Related to Job Search
- ☐ Income from Gaming (If Applicable) and Paperwork from Casinos
- ☐ Income from State or Federal from Previous Year
- ☐ Investment and Interest Expenses (Example: Year End Bank Interest)
- ☐ Stocks or Other Property Sold, as Well as All Purchase Dates. You Must Upload Documents the Investment Company Sent Indicating "Tax Documents Final"

Business Expenses: Do You Own a Personal Business, or Received a 1099? You May Have Additional Deductions or Credits!

- ☐ Schedule C or Business Expense Info Needed:
  - Name of Business/What Does This Business Do? /Address of Business /EIN of Business
    - How Much Did the Business Make?
    - 1099s for the Business Are Included in a Schedule C
  - Mileage of Car(s) Used for Business – Odometer Reading at End of Year
    - Type of Car – Ford F150 (example)
    - How Many Miles Were Used for Business?
  - Totals of Expenses Used for the Business Year. Here are Category Examples:
    - Cell Phone
    - Uniforms
    - Subscriptions and Dues
    - Tools and Supplies
    - Repairs and Maintenance
    - Contractor Expenses
    - Insurance Expenses Related to the Business
    - Travel, Tolls, Parking
    - Taxes and Licenses
    - I Need to Know If You Are on Location Overnight for Periods of Time (Example: An Offshore Worker Who Works 30 On, 30 off)
    - Legal and Professional Services
  - Assets (Equipment/Car) used for Business
    - Send Titles/Invoices of All Business Purchases – or Date/Amount Paid
- ☐ If You Moved for Your Job More Than 50 Miles, You Are Eligible for Deductions If You Were Not Previously Reimbursed by Your Company

Even More Credits and Deductions!

For Personal Returns:

What has been listed are the most common requests needed for an individual tax return.
There may be other deductions and credits you can take advantage of, such as if you had damage during a hurricane season, so please also refer to this link for the full listings of credits and deductions:
LINK: https://www.irs.gov/Credits-Deductions-for-Individuals

For Business Returns:
What has been listed are the most common requests needed for a business tax return.
Please refer to this link for the full listings of credits and deductions:
LINK: https://www.irs.gov/credits-deductions/businesses

Everything Ready to Send?

Everything ready? Please upload your scanned files (pdf, jpg, word, excel, any type ok) using this FREE secure transfer program: https://wetransfer.com/ and send to euna@cypresstaxprep.com.

About Fees:

The fee for the preparation of your tax returns is based upon the unique forms and schedules needed to prepare an accurate return for you. All invoices are due and payable upon presentation.

CTP keeps their fees as low as possible so that we can pass the savings along to you!
Payment, unless otherwise indicated, is due upon receipt of Tax Preparation presentation.
If not otherwise indicated, pricing is $50/HR.

Individual Pricing:

General Conversation | ½ Hour | How Can CTP Assist You? .... FREE
Basic Review of Prior Year Taxes (New Clients Only) .... FREE
1040 Tax Return (Includes 1040EZ, 1040A) $75
State Tax Return (Each State) $75
Dependent Tax Return (If filed when parents file at same time) $50
Dependent State Tax Return (If filed when parents file at same time) $50

Individual Pricing Additional:

Schedule B (Interest and Dividends) *starting at** $35
Schedule C (Sole Proprietor Business) *starting at** $50
Schedule D (Capital Gains and Losses) *starting at** $35
Schedule E (Rental Properties) *starting at** $35
Schedule F (Farm) *starting at** $35
Other Schedules Specifically Populated *starting at** $35
Additional Schedules that Automatically Populate/No Input Needed .... FREE
1040x (Amended Return) *starting at** $125
Look under Added Services

Business Returns:

Business Tax Returns 1120, 1120s $500
Partnership Business Tax Return 1165 .... $500
NFP (Non-Profit) Tax Return EZ Postcard $125
NFP (Non-Profit) Tax Return Long $500
Business State Tax Return $250
Franchise Taxes (Pre-Pay) $100
LLC Formation Assistance (Pre-Pay) .... $200-$500
File Business Extension (Pre-Pay) $100

Added Services:

Bookkeeping | Per Hour, 1 Hour Minimum (Adding up Receipts/Categorizing) $35
Contacting IRS | Per Hour, 1 Hour Minimum $35
Presenting New Information AFTER Tax Return Has Been Prepared & Presented | Per Hour $50
Soft Copy of Final Tax Preparation .... 1 COPY INCLUDED FREE AT PRESENTATION TIME
Soft Copy Requested of Previous Years | Per Year – (Pre-Pay) $10
Paper Copy of Final Tax Preparation – (Pre-Pay) $10
Priority Mail Paper Copy of Final Tax Preparation – (Pre-Pay) $10
Request Tax Extension – (Pre-Pay) $100
Creating Letter for Mortgage Company – (Pre-Pay) $25
Sending Paper Tax Return by Priority Mail to IRS $35

About Responsibility:

It is always your responsibility to provide information required for preparation of complete and accurate returns. You are responsible for keeping all documents, canceled checks, original receipts, accurate mileage charts, and other data that support reported income and deductions as requested by the IRS for a minimum of 3 years and up to 7 years. This is necessary to prove accuracy and completeness of the returns to a taxing authority.

You are ultimately responsible for the accuracy of your returns, so please review the final drafts carefully for accurate information.

CTP tax preparation work does not include any procedures to discover and organize the records you provide to us. If this additional service is requested from you, we can provide additional accounting and bookkeeping assistance necessary for additional preparation of your income tax returns for a fee as detailed in this letter.

About Tax Letters or Audits from IRS:

It is possible that taxing authorities such as the IRS may randomly select your tax return for review, you are always welcome to present any letters you have received from the IRS promptly to Cypress Tax Prep. Please do so within 3 days of receiving your letter. You will NOT receive phone calls or emails from the IRS, you will ONLY receive official letters – anything else is a FRAUD!

I look forward to assisting you!

Warm Regards,

Euna Poole

Tax Specialist
Questions? Contact euna@cypresstaxprep.com or call 337-600-4774