

MA's Bookkeeping & Tax Service

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NEW CLIENT - TAX PREP CHECKLIST

GENERAL

PERSONAL INFORMATION

Full name, SSN & DOB
Spouse full name, SSN & DOB
Copy of last year's tax return
Dependents' name, SSN & DOB
Evidence of Dependent status for Credits
Address
Driver License, both taxpayer & spouse
Banking Account, number & routing

BUSINESS INFORMATION

Full Legal Name of Business
EIN & State ID Number
Copy of last year's tax return
Owner's Name, SSN, % of ownership
Type of product or service
Address
Type of Entity
Income & Expenses

INCOME

W-2s from all employers
1099 & 1098 forms
K-1s from businesses
Interest & Dividend income

Alimony
Unemployment
Social Security
Gambling winnings

ITEMIZED DEDUCTIONS (if not taking the standard deductions)

Charitable Contributions
Medical Expenses
Mortgage interest from Form 1098
Gambling losses (up to the amount of gambling winnings)

DMV Registration
Tax Preparation Fee
Property Taxes

OTHER

Student Loan Interest
Education Credits (1098-T)
Childcare Expenses (provider info needed)
Records of Buying and Selling of Stocks

Health Care Costs & Forms
Estimated Tax Payments
Retirement Contributions
HSA Contributions