A Tax Solution & Small Business Svcs, Inc.

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NEW CLIENT CHECKLIST

Taxpayer Name:______________________ SSN:______________________ Date:______________

Spouses Name:______________________ SSN:______________________

PLEASE BRING WITH YOU:

*Driver License(s)
*Social security cards for dependents and birthdates, if you are a NEW CLIENT
*All W-2's
*Real estate closing statements for purchases, sold or refinance
*Last years tax returns if you are a NEW CLIENT
*1099 INT, 1099 DIV, 1099-MISC, 1099-R, 1099-G
*Any other 1099's not listed above

MEDICAL:

*Insurance and Medicare Premiums
*Prescriptions
*Doctor visits/copays
*Eye exams, glasses & contact lenses
*Dentist visits
*Smoking cessation programs
*Medical Mileage
*Other

INTERST PAID:

*1098 Mortgage Interest Statements for all mortgages to include main residence, 2nd mortgages or lines of credit, 2nd homes, land
*Motor Home/Travel Trailer Interest paid
*1098-E Student loan interest paid

OTHER INCOME

*W-2 G's Gambling win/loss statements
*Unemployment compensation received
*Any other misc. income

TAXES

*Property Taxes for residence, second home and/or land
*Vehicle license plate renewal(s)

ADJUSTMENTS:

*IRA Taxpayer
*IRA Spouse
*Keogh Plan (401K/Retirement Plan)
*Unreimbursed Business expenses
*Student loan interest
*Moving expenses (armed forces only)

OTHER INCOME/DEDUCTIONS:

*1098-SA Social Security Administration
*Alimony paid/received, name & SS # of to/from whom (2018 and prior)
*Casualty loss
*Continuing Education, license renewals
*Office in home

CONTRIBUTIONS:

*Written receipts
*Itemized list of donations, charitable contributions/ tithes to church
*Vehicle donation statement
*Other

RENTAL PROPERTY:

*Rent received
*List of expenses, repairs, travel expense/mileage, utilities, telephone, HOA advertising, insurance, etc.
*1098 Mtg Interest
*Closing Statement of any property purchased, sold or refinanced
*Dates and costs of any major improvements or furniture and fixtures purchased

SALES OF ANY STOCKS, BONDS, MUTUAL FUNDS OR SALES OR EXCHANGES OF ANY REAL ESTATE:

*1099's from brokers, attorneys or title companies
*Costs of any major improvements to main residence if sold
*Payment schedule of principal and interest received on contracts

EDUCATION CREDITS

*Tuition and fee expenses
*1098-T from Institution, books/fees
*529 Plan contributions or disbursements

CHILD CARE PROVIDER INFO:

Name:______________________
Address:______________________
____
EIN or SSN:______________________

CHILD CARE PROVIDER INFO:

Name:______________________
Address:______________________
____
EIN or SSN:______________________

***ANY AND ALL OTHER TAX FORM DOCUMENTS REPORTED TO THE INTERNAL REVENUE SERVICE NOT ALREADY SPECIFIED**