

PAPER WORK NURSE



Punch List for Tax Clients / Customers

Mandatory

*Drivers license of ID

*Social Security Card

Married Couples Filing HOH , MFS, Widow

What is your occupation?

*Even if separated, Must have spouse, DOB, Social Security Number,

and if filing Itemized or Standard for the current tax year

If you are the custodial parent, you can use form 8332 to release a claim to exemption for your child so that the non custodial parent can claim an exemption for the child.
...or you can use the same form to revoke the release of claim.

*Delay in providing information will change the completion date of Tax preparation

*Be prepared to sign a service agreement for Tax services over \$100.00

* E-File is included for the current year tax return service in which you will receive an electronic copy.

All back taxes must be mailed and will be an extra fee of \$25.00 that will include Priority mailing w/ Copies to the Federal & State.

INCOME

**** IMPORTANT NOTE***

1099 MISC	Misc Income	<i>IRS Transcript will not show Employers information needed to file taxes, or State tax deductions if return was not Efiled. However, the best option to retrieve Income statements is through you employer Human Resources Dept or the Social Security Administration</i>
1099 NEC	Self Employment	
1099 K	Cashapp, paypal, etc..	
1099 G	Unemployment	
SSA	Social Security	
1099 R	Retirement	
1099 B	Proceeds from Broker	
1099 DIV	Dividends and Distributions	
1099 INT	Interest income	

Bring all statements

If you have self employment income but no statements, prepare to use your bank statements as a form of verification, along with an explanation of funds not showing.

DEDUCTIONS

Dependants

ID, Birth Certificate, & Social Security Card
Form 8832 - Other parent permission to file
Are you the only one in the household who care for your child

Real Estate

Form 1098
or equivalent iOriginal Principle, Origination Date,
Mortgage Interest Paid, Real Estate Taxes
Did you buy or sell your home?

Vehicle

Did you take Section 179?
Beginning Mileage
Ending Mileage
Mileage used for work or business

SELF EMPLOYED - BUSINESS OWNER

VEHICLE INFO, MAKE, MODEL, YEAR PURCHASED, & PRICE

Payroll
Supplies
Rentals
Uniform
Advertising
Estimated Tax Payments
Personal Property Tax (Real Estate)
Auto Personal Property Tax
Auto Registration Fees

If you use you home as an office you may be able to receive a tax break
List, Square Foot of the entire house and office space used for your business