

STARTER QUESTIONS FOR TAX PREPARATION

Name : _____ Signature: _____ Date: _____

**Current Driver's license or ID

**Social Security Card or prior tax return

** Birth Certificates for all dependents

** If you would like to receive your refund via bank account, please provide routing and account numbers

*Answer Questions

1. Would you like to E-file or mail your return (E-file deadline is April 15, 2026)
2. What is your occupation? _____
3. Did you live in your state all year round? _____
4. Are you married? If yes, you will need spouse information, Income statements, DOB, Social, etc *(If your spouse file Standard or Exemptions, you must file the same)* _____
5. Did you live in your state the entire year? _____
6. Did you make money in any other state? _____
7. Do you own a home or rental property? _____
8. If you filed last year, what is your AGI? _____
9. Are you Self-Employed, or do you own a business? _____

Check all Income statements that you receive

(Please make sure you have received all your annual forms before filing)

√	Forms	Definition	How many?
☐	W2	Wages	_____
☐	1095 C	Lottery	_____
☐	1099 MISC	Misc Income	_____
☐	1099 NEC	Self-Employment	_____
☐	1099 K	Cashapp, PayPal, etc..	_____
☐	1099 G	Unemployment, etc...	_____
☐	SSA	Social Security	_____
☐	1099 R	Retirement	_____
☐	1099 B	Proceeds from Broker	_____
☐	1099 DIV	Dividends and Distributions	_____
☐	1099 INT	Interest income	_____
☐	1098	Mortgage Interest	_____
☐	1098-T	College Tuition Statement	_____
	Other	_____	_____
	Other	_____	_____
	Other	_____	_____

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If you are you Self-Employed, or a Business Owner, please gather the following information

VEHICLE INFO

Make, Model, Year purchased, & Price

Auto Personal Property Tax

Auto Registration Fees

Did you take Section 179?

Beginning Mileage

Ending Mileage

Mileage used for work or business

Did you file Standard vehicle deductions last year?

BUSINESS EXPENSES

Phone, Internet,

Payroll

Supplies

Rentals

Uniform

Advertising

Business License

Estimated Tax Payments

RENTAL PROPERTY (Real Estate)

**If you use your 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