

TAX PREP CHECKLIST

CLIENT DATA

- NAME
- DATE OF BIRTH
- OCCUPATION (JOB TITLE)
- EMAIL
- PHONE NUMBER & PHONE CARRIER
- PIN # FROM IRS (IF YOU HAVE ONE)
- ADDRESS (CITY, STATE & ZIP CODE)
- FILING STATUS (YOU CAN ONLY FILE HEAD OF HOUSEHOLD IF NO ONE ELSE HAS FILED HOH AT THAT ADDRESS)
- ROUTING/ACCOUNT # (FOR DIRECT DEPOSIT)
- ARE YOU ACTIVE DUTY?

DOCUMENTS FILE WITH RETURN

- DRIVERS LICENSE
- SOCIAL SECURITY CARDS (IF YOU HAVE THEM)
- 1098T (SCHOOL FORM)
- 1099 FORMS
- W2'S
- MORTGAGE STATEMENTS
- 1095A FORM
- 1099G (UNEMPLOYMENT FORM IF YOU RECEIVED UNEMPLOYMENT)
- CHILDCARE RECORDS (INCLUDING THE PROVIDER'S TAX ID NUMBER OR SSN, NAME, ADDRESS, PHONE NUMBER)

DEPENDENT INFORMATION

- SS NUMBER
- FULL NAME
- DATE OF BIRTH

ARE YOU FILING YOUR BUSINESS?

IF YOU HAVE DOCUMENTATION FOR PROOF OF INCOME OR PROOF OF EXPENSES. YOU CAN PROVIDE...

- BUSINESS LICENSE
- RECORDS OF GROSS RECEIPTS
- SUMMARY OF INCOME/EXPENSES
- BANK STATEMENTS
- BUSINESS NAME
- PROFESSION
- BUSINESS ADDRESS (IF DIFFERENT FROM HOME)
- EIN

ADDITIONAL INFORMATION

FILING HEAD OF HOUSEHOLD?

- BANK STATEMENT
- PROPERTY TAX BILL
- RENT STATEMENT
- UTILITY BILL
- (IF MARRIED AND NORMALLY FILE JOINTLY W/ SPOUSE BUT DECIDE TO FILE HEAD OF HOUSEHOLD)
- DIVORCE DECREE/ SEPERATION AGREEMENT.

DISABLED DEPENDENT

- MEDICAL STATEMENT
- SOCIAL SERVICES AGENCY STATEMENT

QUALIFYING DEPENDENT (PROOF OF EITC)

- SCHOOL RECORD OR STATEMENT
- LANDLORD/PROPERTY MANAGEMENT STATEMENT
- MEDICAL RECORDS
- SOCIAL SERVICE STATEMENT
- EBT RECORDS

SEND ALL INFORMATION AND DOCUMENTS TO MY EMAIL AT SHATAVIA@MASTERMINDTAXSERVICES.COM.

SUBJECT TITLE: YOUR FULL NAME


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WWW.MASTERMINDTAXSERVICES.COM