Checklist for Personal and Corporate Taxes

Personal Taxes:

- ❑ W-2's or 1099's
- ❑ Verification of Health Insurance (Forms 1095-A, B, or C)
- ❑ Mortgage Statement
- ❑ Any Medical/Dental Expenses (paid by taxpayer &/or spouse)
- ❑ Car Tags (If not paid thru a corporation) or Vehicle Purchase
- ❑ Any Charitable Contributions
- ❑ Interest Statements
- ❑ Settlement Statements (new home purchase or re-finance)
- ❑ Any Stock Transactions (include the basis)
- ❑ Any Year-End Paperwork
- ❑ K-1 (if Corporate Return was not prepared by Davis & Associates, CPA.)
- ❑ Copy of Last Year's Tax Return (if you are a first-time client)
- ❑ Did you get Married, Divorced, Move, or add/drop a Dependant?

Corporate Taxes:

- ❑ Income Statement
- ❑ Balance Sheet
- ❑ Asset Listing (new assets for tax year – bought, sold and price)
- ❑ Copy of Last Year's Tax Return (if you are a first time client)
- ❑ Add or Buy out a Business Partner? Final Tax Return?

If you do no have the above, you need:

- ❑ Bank Statements
- ❑ Credit Card Statements
- ❑ Check Stubs (if not included in Bank Statement)
- ❑ Asset Listing (purchase date & price)