Checklist of things to bring

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else. Please return this list with the MANDATORY items. Thanks!

- ☐ **Signed Annual Engagement Letter (Mandatory)**
- ☐ **Completed New Client Questionnaire (Mandatory)**
- ☐ **Completed Business Tax Organizer (Mandatory)**
- ☐ **Prior Year Tax Returns (Federal and all State returns) (Mandatory)**
- ☐ **Depreciation schedules (regular and AMT) for prior year (Mandatory)**
- ☐ **All legal documents for formation, sale or purchase of a business during the year (Mandatory)**
- ☐ **QuickBooks backup or General Ledger**
- ☐ **Voided check (not deposit ticket) for account where state taxes owed should be drafted (Mandatory)**
- ☐ Copies of W-2's, 941, 940's and SUTA returns for current year.
- ☐ All 1099 forms received and issued to subcontractors
- ☐ Year-end loan statements
- ☐ If you bought, sold or refinanced real estate, then the multi-page HUD closing statement for each transaction
- ☐ If you are claiming auto mileage as a deduction for business, we need to know: total miles, commuting miles, and business miles driven for the year
- ☐ Copies of any federal, state or local tax correspondence received
- ☐ The **dates** and **amounts paid** for ALL estimated tax payments (federal, state, school district and local) and the amounts of ALL refunds or rebates received for current tax year