

TAX RETURN PREPARATION CHECKLIST

Simple Tax Return

W2

1099

ID

Social Security

Past (2019, 2020)

Dependent

Birth Certificate

Social Security (each)

Doctor or School letter (minor)

Rental Income

Mortgage Statement

Total amount of utility (AE):

Electricity

Gas

Water

Phone

Cable

Any other expenses related to the Rental Income

Cleaning

Repairs

Contractors

Supplies for the maintains

If you claim your car as part of your Business, we would need

Total amount spend (Monthly or
Yearly)

Original cost of car

When did you start using it for
business

Monthly lease amount

Insurance

Toll

Gass

Repair

Registration

Number of miles on a Year

***Note: Everything has to be related to the
business.

Business

Article of Organization (Document that
they give you when you started the
Business)

Tax ID number

All the expenses occur for the
Business (2020)