



Tax Preparation Checklist

Tax Year _____

Virtual or Office Tax Drop Off (Individual taxpayer)

- Copy of 2016 return or the last one filed
- W2 & 1099
- Business Income & Expenses
- Mortgage Interest Statement
- Charitable contribution
- Brokerage Statement
- Dates of birth & SS#'s for tax payer, spouse and any dependents (copies of SS for everyone in Household)
- Copy of your DL for taxpayer and spouse
- Casualty Losses from Hurricane Matthew or Irma
- Health insurance documentation (Forms 1095-A, 1095-B and 1095-C)

Virtual or Office Tax Drop Off (Business tax)

- Copy of 2016 return or the last one filed
- W2 & 1099
- Profit & Loss - 2017
- Balance Sheet 12/31/2017
- Last year's return 2016
- Casualty Losses from Hurricane Matthew or Irma
- Bank statements, check registers, and credit card statements if your bookkeeping needs to be done

Call if you have any questions, we will guide you.

(386) 320-5347