YOUNG & COMPANY
Certified Public Accountants, LLP

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TAX APPOINTMENT CHECKLIST

Time of Appointment:______________________ Date:__________________________

We need all the below information as you may take a standard deduction on the Federal return but itemize on the State return**.**

- ☐ **Copy of the front and back your current Driver's License:** Both spouses if filing jointly.
- ☐ **Form W-2:** Wage statements from employers.
- ☐ **Form 1099-INT:** Interest statements.
- ☐ **Form 1099-DIV:** Dividend statements from investments.
- ☐ **Form 1099-R:** Pension statements.
- ☐ **Form 1099-B:** Statements from broker for stock and/or mutual fund sales.
  (Also bring original cost and date purchased)
- ☐ **Form K-1:** Statement from partnerships or S-Corporations.
- ☐ **Social Security statements of income.**
- ☐ **Unemployment income received.**
- ☐ **Rental income & expenses.**
- ☐ **Business income & expenses.**

- [ ] **Form 1098 Mortgage interest**
- [ ] **Real estate taxes paid.** (May be reported on the Form 1098)
- [ ] **Charitable contributions.** (Both cash and non-cash)
- [ ] **Estimated tax payments for Federal and State government.** We need the amounts and the dates they were paid.
- [ ] **Dates of birth and social security cards for your dependents. If you are entitled to the Earned Income Tax Credit, you must also provide proof of residency for all children.**
- [ ] **Form 1098-T: Tuition Statement. A Form 1098-T is now <u>required</u> to claim any tuition tax benefits.**
- [ ] **Student loan interest paid.**
- [ ] **Medical and dental expenses including long term care insurance premiums paid, if any.**
- [ ] **Documentation for any large purchases** (i.e.; car, boat, RV) that you ***paid sales tax*** on, including the date purchased.
- [ ] **Roth and Traditional IRA, UNI-401(k), SIMPLE Plan, & SEP contributions.**
- [ ] 12 **months of bank statement for all foreign bank accounts.**
- [ ] **If you had an ownership interest in a foreign corporation - contact the office for an additional checklist.**
- [ ] **Last income tax return filed,** <u>if prepared by another preparer</u>.
- [ ] **VOIDED blank check**, if you would like direct deposit of your tax refund.
- [ ] **We need your current email address and your cell phone number.**

Basic Information Needed to Complete Tax Returns

Name:________________________________ Date:_________ ____________

If you use QuickBooks to keep your company records:

- Backup copy of QuickBooks file updated through December 31, 2019

If you do not use QuickBooks to keep your company records:

- December 31, 2019 balance sheet
- January 1 - December 31, 2019 profit & loss statement
- Detailed General ledger for 2019 in electronic format

The following information is required for all companies, regardless of how you maintain your company records (electronic copies or pdfs of the information can be provided):

- Copy of December, 2019 statements for all business bank accounts
- Copy of December, 2019statements for all credit card accounts
- Copy of December, 2019 statements for all bank loans or bank lines of credit
- Copy of 2019 quarterly payroll returns and W-2's/W-3's
- Copy of all your sales tax returns.
- Copy of your filed IT-204-LL (if applicable), if you filed your own return
- Copy of payroll register for last payroll run during 2019.
- A list of all your physical inventory as of December 31, 2019.
- Information on any new fixed asset purchases made in 2019.
- Information on any new loans obtained during 2019.
- Information on any significant or unusual transactions during 2019.
- Information on any estimated tax payments you made in 2019.
- Signed copy of the attached TR-2000.

If you have other members in your household we will need the same questions answered for them as well.

Signature:____________________

For additional information please go to https://youngandcompany.net/