

TAX PREP CHECKLIST

RENTAL PROPERTY CHECKLIST

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|--|--|
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Mileage, Travel, Advertising, Subscriptions |
| <input type="checkbox"/> List of Rental Expenses | <input type="checkbox"/> Mortgage Interest |
| <input type="checkbox"/> Insurance Premiums | |
| <input type="checkbox"/> Real Estate Taxes Paid | |



BUSINESS CHECKLIST

- | | |
|--|---|
| <input type="checkbox"/> EIN (Tax ID) | <input type="checkbox"/> Business Use of Home (if applicable) |
| <input type="checkbox"/> Business Income and Expenses | <input type="checkbox"/> Business Bank Statements |
| <input type="checkbox"/> List of Assets and Equipment including purchase and financing docs. | <input type="checkbox"/> Credit Card & Loan Statements |
| | <input type="checkbox"/> Payroll & 1099 Filings |



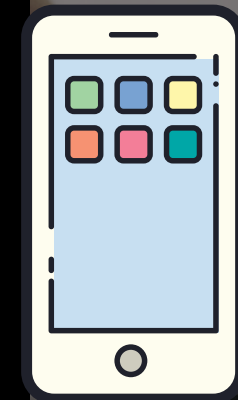
TAX PREP CHECKLIST

ALL TAX FILERS

- | | |
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| <input type="checkbox"/> SSN and DOB (yourself and dependents) | <input type="checkbox"/> 1099 for other income forms |
| <input type="checkbox"/> Bank Account and Routing Number | <input type="checkbox"/> Health Insurance Forms |
| <input type="checkbox"/> Copy of Last year's Return | |
| <input type="checkbox"/> W2's from all employers | |

RESIDENTIAL PROPERTY OWNERS

- | | |
|---|---|
| <input type="checkbox"/> 1098 Form (Mortgage Interest) | <input type="checkbox"/> Closing documents if you bought or sold for the year |
| <input type="checkbox"/> Receipt from Energy Efficient Upgrades | |



TAX PREP CHECKLIST

OTHER

- Retirement plan contributions
- Educational Expenses
- Updates to Entity Structures
- Updates to Banking Structure
- Sale of Stock and Ownership
- Additional Filings, Requests

