Daniel R. Slavinski, CPA

Checklist for Personal and Corporate Taxes:

Personal Taxes:

- ☐ Copy of Last Year's Tax Return *(if you are a first-time client)*
- ☐ Did you get Married, Divorced, Move, or add/drop a Dependent?
- ☐ W-2's OR 1099's
- ☐ Verification of Health Insurance *(Forms 1095-A, B, or C)*
- ☐ Mortgage Statement
- ☐ Closing Disclosure / Settlement Statements *(new home purchase or refinance)*
- ☐ Any Medical/Dental Expenses *(paid by Taxpayer &/or Spouse)*
- ☐ Car Tags *(if not paid thru a corporate)* or Vehicle Purchase
- ☐ Any Charitable Contributions
- ☐ Interest Statements
- ☐ Tuition Statements for kids in college
- ☐ 529 Plan Contributions or Distributions
- ☐ Estimated Payments *(Federal and State)*
- ☐ Any Stock Transactions *(include the basis)*
- ☐ Any Year-End Paperwork
- ☐ K-1 *(if Corporate Return was not prepared by Daniel R. Slavinski, CPA)*
- ☐ Additional Child Tax Credit *(total amount received)*

Corporate Taxes:

- ☐ Income Statement
- ☐ Balance Sheet
- ☐ Asset Listing *(new assets for tax year – bought, sold, and price)*
- ☐ Copy of Last Year's Tax Return *(if you are a first-time client)*