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 re-finance)
- ☐ 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 Davis and Associates, CPA)
- ☐ Total Amount for 3rd Stimulus (total amount received)
- ☐ 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)