

Legend Tax

Appointment Checklist

Being prepared is the first step in having a successful tax appointment. Browse through this all-inclusive checklist to find items that may apply to your specific tax situation. Our personalized one-on-one approach allows us to help you navigate through the multitude of tax forms and customize a tax structure to maximize your tax benefits. A private consultation with one of our trained professionals is just a phone call away.

PERSONAL

- Most Recently Filed Tax Return
- Tax Forms (Mailed by January 31)
 - *W2*: Employee Earnings
 - *1099-MISC*: Self-Employment Earnings
 - *Form 1098*: Mortgage Statement
 - *1099-B*: Stock Brokerage
 - *1099-C*: Cancellation of Debt
 - *1099-DIV*: Dividends
 - *1099-G*: Government
 - *1099-INT*: Interest
 - *1099-R*: Retirement
 - *1099-B*: Stock Transactions
- Social Security Numbers (Taxpayer, Spouse, Dependents)
- Birthdays (Taxpayer, Spouse, Dependents)
- DMV Fees
- Charity
 - *Cash Contribution Letters* (Church, Non-Profit)
 - *Non-Cash Contributions* (Goodwill, AMVETS, Salvation Army)
- Property Tax Statements (Two Statements Per Year)
- Primary Home and Rental Property Transactions
 - *Purchase* – Purchase escrow statement
 - *Sale* –Purchase escrow statement
 - *Refinance* – Refinance escrow statement
 - *1031 Exchange* – Exchange accommodator paperwork, Purchase escrow, and sale escrow
- Day Care
 - Employer Identification Number (EIN)
 - Address
 - Phone Number
 - Amount Spent per Child

BUSINESS

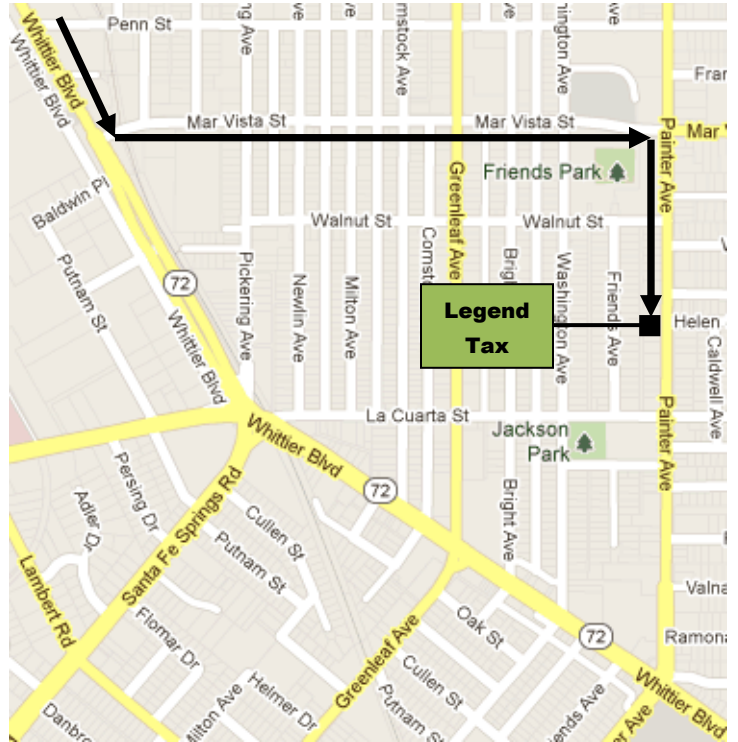
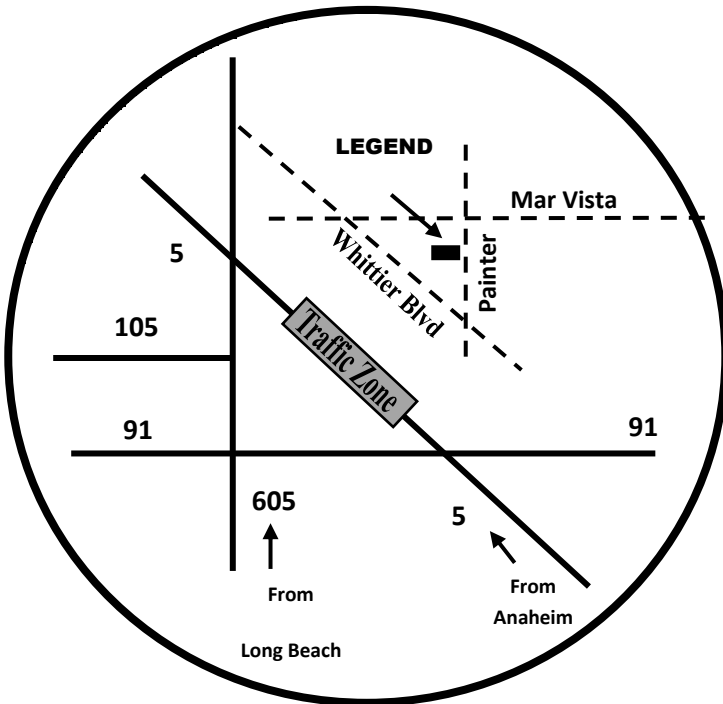
- Income Statement – Summarize revenue and expenses by tallying bank deposits and receipts. Download the Services Worksheet from our website as a guide
- QuickBooks Reports – Print income statement and balance sheet reports on cash basis
- Corporate /LLC Binder
- 1099-MISC Request Form

RENTAL

- Rental Property Income Statement Worksheet
- Mileage Log



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