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Tax Preparation Checklist

For virtual Dropoff, please visit our website at
<https://www.fixitaccounting.com/client-portal>

Individual taxpayer

- Copy of the last tax return filed, if we didn't prepare it
- W2s & 1099s
- Business Income & Expenses
- Mortgage Interest Statement
- Charitable contributions
- Brokerage Statements
- Dates of birth & SS#'s for taxpayer, spouse and any dependents (copies of SS for everyone in Household)
- Copy of your DL for taxpayer and spouse
- Casualty Losses from Hurricanes that impacted you

Business taxpayer

- Copy of the last tax return filed, if we didn't prepare it (Form 1120S or 1065)
- 1099s and any payroll tax returns filed during the year (Form 941, 940 and RT-6)
- Profit & Loss for the year
- Balance Sheet as of the last day of the year, if you have one
- Casualty Losses from Hurricanes that impacted you or your business
- Business bank statements, check registers and credit card statements for all 12 months if your bookkeeping needs to be done

**Call us with any questions
(386) 320-5347**