



2020 TAX FILING Checklist

AFFORDABLE SMALL BUSSINESS SOLUTIONS LLC

The following checklist is designed with you in mind to help you gather your tax paperwork as efficiently and completely as possible so we can prepare your return as quickly and completely as possible. Use the boxes to the left of the items to check off tasks as you complete them.

IDENTIFICATION INFORMATION:

Your information:

*Name - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

* DMV LIC numbers _____ Date issued _____ Date expires _____

Spouse's information:

*Name - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

* DMV LIC numbers _____ Date issued _____ Date expires _____

All dependent's information:

*Name #1 - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

*Name #2 - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

**If more than 2 dependents, please add additional information on a new page.

*Name #3 - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

*Name #4 - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

**If more than 2 dependents, please add additional information on a new page.

*Name #5 - _____

*Social security number - _____

*Date of birth - _____

* Email address - _____

* Phone numbers (please indicate if cell, home, work, etc) - _____

**If more than 2 dependents, please add additional information on a new page.

INCOME INFORMATION:

- Attach W-2 forms (you should have this if you earned wages from an employer)
- Attach W-2G forms (you should have this if you earned any major gambling winnings)
- Attach 1099-DIV forms (you should have this if you earned any dividends via any stocks)
- Attach 1099-INT forms (you should have this if you earned interest via savings, bonds, personal loans, etc)
- Attach 1099-MISC forms (you should have this if you earned any income for services/products from a source other than a primary employer)
- Attach 1099-R forms (you should have this if you earned any retirement income)
- Attach 1099-G forms (you should have this if you earned any income from the government including refunds from previous tax return)
- Attach 1099-SSA forms (you should have this if you earned income via social security)
- Attach 1099-P forms (you should have this if you sold any land, building, equipment, stocks, bonds, etc)
- Annual income from rental property - \$ _____
- Annual income from private business - \$ _____
- Annual income from a business that is a partnership - \$ _____
- Annual income earned from a trust - \$ _____
- Any other annual income not captured above i.e. alimony, debt cancelation, etc. (please note where income comes from) - \$ _____

DEDUCTIONS:

- Annual health insurance premium cost - \$ _____
 - Total miles driven for medical services in 2020 - _____
 - Annual out of pocket cost for medical, vision or dental expenses - \$ _____
 - Attach 1098 forms or state annual real estate taxes - \$ _____
 - Annual personal property taxes - \$ _____
 - Annual donations to charity or non-profit organization - \$ _____
 - Total miles driven for charitable purposes (please explain) - _____
 - Any unreimbursed business expenses (please explain) - _____
 - Any gambling losses - \$ _____
 - Any tax preparation fees - \$ _____
 - Any education expenses - \$ _____
 - Annual expenses to operate rental properties (please explain) - \$ _____
-

Annual expenses to operate private business (please explain) - \$ _____

Annual expenses to operate business that is a partnership (please explain) - \$ _____

Annual expenses to operate a trust (please explain) - \$ _____

We depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover. The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. We will return your original records to you at the end of this engagement if you gave this to us as well as the completed tax return for your review. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our fee will be based on complexity of your return. **Please ensure you are aware of the price for your return and are prepared to pay for services rendered within 30 days of invoicing which will be done when return is complete. Return will not be submitted until invoice is paid in full.**

To affirm that this packet correctly summarizes your understanding of the arrangements for this work and to the best of your knowledge includes all data to be used in your tax return, please sign and date below. We appreciate your confidence in us and don't hesitate to call if you have any questions (757-635-8695).

Name/Date

Spouse's Name/ Date (if filling jointly)