

DBI Taxes & Accounting
(385) 269-0298 dbitaxservice@gmail.com
Tax Checklist

Client Name(s):

If new client:

Dates of birth, SS numbers and genders of all family members
Copy of your last filed income tax return if we did not prepare it for you

All Clients:

Notice 1444- EIP Stimulus Check Reconciliation
W-2's
1099-INT, 1099-MISC, 1099-NEC, 1099-R, 1099-DIV, 1099-SSA
College students: 1098-T
Health Insurance: 1095A, 1095B, 1095C
Drivers License #, Issue Date, Expiration Date (if expired or renewed during tax year)
Bank, routing number, account number (if anticipating a refund)
Phone Number, current address and email address
Children born during tax year- SS#, DOB, Gender, Name
Childcare Statement
Child Support and Alimony- if needed, legal papers for divorce, adoption or separation
involving custody of dependent children, SSN of person(s) receiving alimony
Which dependents are you claiming

Any virtual currency (ie Bitcoin) or foreign accounts- Yes or No
Any tax notices sent to you by the IRS or other taxing authority

Vehicle Purchased during tax year: date, amount, sales tax, registration & fees
Move/New Home- Purchase amount of new home, new address, miles from previous home,
amount old home sold for, date of sale & time lived in old home, closing docs
Mortgage interest paid (all properties own): 1098
Property Taxes: for all properties owned
Charity/church donations and miles
Brokerage statements showing sales of stock, bonds, etc.
K-1 if you have a LLC, partnership, trust or corporation
Profit and Loss statements for small businesses
Rental income and expenses: address, days rented during the year, profit and loss statement,
mileage to/from rental, how many trips, repairs, maintenance, cleaning, upgrades,
mortgage interest- 1098, property taxes, utilities (if paid by owner)

*We'll notify you when your taxes are finished. Your invoiced amount can be paid by check
(payable to DBI) or you can pay with Venmo: @DBI-Taxes*

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Tax Checklist

Business Deductions for small business/self-employment

Business Name:

Costs of goods purchased to operate your business

Advertising

Contract Labor

Legal/Professional Fees

Auto: Gas, repairs, tires, oil, repairs

Mileage (beginning and end of year odometer reading)

Clothing/Uniform

Grooming

Nights of lodging for business travel

Health Insurance

Internet

Medical

Office

Supplies

Phone

Rent

Equipment purchased (date, amount, sales tax)

Repairs

Utilities

Wellness Program

Bonus- Performance

Employee Benefits (401K, etc.)

Taxes & Licenses

Travel

Meals/Entertainment

Wages

Misc.

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