

DBI Taxes & Accounting, LLC

Walt Burgener & Jamie Maddox

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Tax Checklist

Personal Returns:

New Clients: Dates of birth, SS numbers and genders of all family members

Copy of your last filed income tax return

Current address -please notify us if you moved within the past year

Phone Number and email address for both spouses

Bank, routing number, account number

Driver's License #, Issue Date, Expiration Date

Children (any babies born in the tax year)- SSN, DOB, Gender

Which dependents you're claiming

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

W-2s & 1099s

All Forms 1099 for interest, dividends, NEC, retirement, miscellaneous income, Social Security,
gambling winnings, etc.

College students: 1098-T

Health Insurance: 1095A, 1095B, 1095C

Any virtual currency (ie Bitcoin) or foreign accounts

Any tax notices sent to you by the IRS or other taxing authority

Vehicle Purchase (date, amount, sales tax, registration & fees)

Move/New Home- Purchase amount of new home, new address, amount old home sold for,
date of sale and time lived in old home, your closing statement

Receipts for Energy Improvements to your home (windows, doors, Roofs, etc)

1098's- Mortgage interest statements (all properties own)

Property Taxes: for all properties owned

Charity/church donations and miles

Brokerage statements showing sales of stock, bonds, etc.

K-1 if you have an interest in an LLC, partnership, trust or corporation

Profit and Loss statement and Balance Sheet for any business you own

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 through the
QuickBooks link we'll email to you, by check (payable to DBI), cash, or Venmo: @DBI-Taxes*

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Business Deductions for small business/self-employment

Advertising

Auto: Gas, repairs, tires, oil, repairs

Bonus- Performance

Clothing/Uniform

Contract Labor

Costs of goods purchased to operate your business

Employee Benefits (401K, etc.)

Equipment purchased (what was it, date, amount, sales tax)

Grooming (haircuts, nails, etc.)

Health Insurance

Internet

Legal/Professional Fees

Meals/Entertainment

Medical

Mileage (beginning and end of year odometer reading)

Nights of lodging for business travel (city and state and the dates there)

Office

Phone

Rent

Repairs

Supplies

Taxes & Licenses

Travel

Utilities

Wages

Wellness Program (gym memberships, massages,

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