



DYER & ASSOCIATES CPA, PLLC

CERTIFIED PUBLIC ACCOUNTING FIRM | ACCOUNTING | TAX | ADVISORY

Personal Tax Information -

- ☐ Last years income tax return if you are a new client
- ☐ Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
- ☐ Dependent Childcare Provider, Name, Address, Tax ID or S.S.N.
- ☐ Banking information if Direct Deposit is Required

Personal Income Data Required -

- ☐ Wages and/or Unemployment (w-2, 1099 forms)
- ☐ Interest and/or Dividend Income (1099-int, 1099-DIV, 1099-B)
- ☐ State/Local income tax refunds (1099-G)
- ☐ Social Security/RRB Income (SSA-1099, RRB-1099)
- ☐ Pension/Annuity/Stock or Bond Sales (1099-R)
- ☐ Contract/Partnership/Trust/Estate Income (Schedule K-1, Form 1041)
- ☐ Gambling/Lottery Winnings and Losses/Prizes/Bonus
- ☐ Alimony Income
- ☐ Rental Income
- ☐ Self Employment/Tips
- ☐ Foreign Income

Common Personal Deductions-

- ☐ Dependent Care Costs
- ☐ Education Costs/Student Loan Interest (1098-T, 1098-E)
- ☐ Medical/Dental
- ☐ Mortgage/Home Equity Loan Interest/Mortgage Insurance
- ☐ Employment Related Expenses
- ☐ Gambling/Lottery Expenses
- ☐ Health Savings Account Contributions (Form 5498-SA)
- ☐ Investment Expenses
- ☐ Real Estate Taxes
- ☐ Estimated Tax Payments to Federal and State Government and Dates Paid
- ☐ Home Property Taxes
- ☐ Charitable Contributions Cash/Non-Cash, Vehicle Donation (Form 1098-C or letter)
- ☐ Purchase qualifying for Residential Energy Credit
- ☐ IRA Contributions/Retirement Contributions (Form 5498)
- ☐ Home Purchase/Sale



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Business Returns

- ☐ If a new client-we need last years tax return, journal entries, profit and loss statements, and balance sheets
- ☐ All Income (Form 1099)
- ☐ Estimated Tax Payments

Common Business Deductions-

- ☐ Advertising
- ☐ Business Insurance, Bank Fees, Loan Interest
- ☐ Charitable Contributions
- ☐ Education Expenses
- ☐ Equipment Purchases
- ☐ Health Care Expenses
- ☐ Home Office
- ☐ Internet and Cell Phone
- ☐ Legal and Accounting Fees
- ☐ Office Supplies
- ☐ Qualified Business Income (QBI)
- ☐ Rent (for Office Space or Equipment)
- ☐ Retirement Plan Contributions
- ☐ Salaries and Wages Paid to Employees or Contractors
- ☐ Business Taxes, Licenses
- ☐ Travel
- ☐ Uniforms
- ☐ Business Vehicle