TECH and TAXES

Email Form

INCOME TAX CHECKLIST

Items Needed For Income Tax Preparation
Not all items will apply to your specific return

Please provide your prior year tax return to ensure proper inclusion of any previous year carry-over losses, un-allowed passive losses, un-recaptured gains, and depreciation detail for any properties or personal property depreciated in prior years. This is especially important for the repayment of the first-time homebuyer credit.

Records for Income:

- ☐ W-2 for any employment over last year
- ☐ Any 1099 received for interest and dividend income or self-employment income
- ☐ Statement of Capital Gain/Loss Transactions with transaction history of purchase price and date (sales of investments, property, etc.)
- ☐ End of Year Brokerage Account / Mutual Fund Statements (1099-B or 1099 Consolidated)
- ☐ Any 1099 for pension, annuity, or IRA income received or rolled-over
- ☐ Rental Property Information (income and expenses)
- ☐ Prior year state tax refund (1099-G) if 2016 included Schedule A (Itemized Deductions)
- ☐ Social Security statement
- ☐ Alimony Received
- ☐ Information on any investment, property, etc. that paid income to you

Records for Deductions:

- ☐ Form 1098 – Mortgage Interest Paid
- ☐ Records of Medical Costs incurred including any self-paid premiums
- ☐ Real Estate and Property Taxes
- ☐ Alimony Paid
- ☐ Cost of college tuition (Form 1098-T) and student loan interest (Form 1098-E)
- ☐ Record of any IRA or Retirement Savings Plan contribution (IRS Form 5498)
- ☐ Record of any management / planning fee paid for financial services
- ☐ Receipt of any Charitable contributions
- ☐ Record of Child Care Expenses including provider's Federal EIN, facility name & address)
- ☐ HUD-1 or record of sale of home in 2017

This is not an exhaustive list. Please include anything you find relevant to your tax return.

Banking Information:

- ☐ **Voided Check** (for direct deposit of tax refunds or electronic payments)

Miscellaneous:

- ☐ **VERY IMPORTANT** - Anything related to Affordable Care Act (look out for Form 1095-A) and/or evidence of health care coverage
- ☐ Anything received stating: “Important Tax Information”

NOTES:
If you should receive any type of information that is not listed above and question if it is needed for your income tax preparation, please include it with your tax documents. Your tax professional will assist you in determining if the information is pertinent to your income tax return. If you have any questions please do not hesitate to contact our office at (843) 847-6213.

TECH and TAXES

858 N. Halifax Dr.
Ormond Beach, FL 32176

Personal Preference Questionnaire

We have a majority of this information if you are a returning client, but we need to keep our information as current as possible. Please fill out all information, even if you are a returning client. **TechandTaxes** enjoys doing things for our clients on a more personal level and this will be kept **strictly confidential**.

Taxpayer Full Name (First MI Last): ____

Spouse /Other Full Name (First MI Last): ____

Taxpayer Social Security Number: ______________________ Date of Birth: _____________

Spouse Social Security Number: _______________________ Date of Birth: _____________

Home Address: ____

City: _______________________ State: ________________ Zip Code: _______________

Email Address: ____

Home Phone: ___________________ Cell Phone: ______________________

Preferred Method of Contact:

O E-Mail

OHome Phone OCell Phone

Preferred Contact Time: O AM O PM O Hour _________

Dependents Information:

First Name	MI	Last Name	Date of Birth	Social Security #	Relationship

Filing Status: O Single O Married Filing Jointly O Married Filing Separately

O Head of Household O Qualifying Widower with Dependant Child

Tax Payers Occupation: ______________________ Employer: ________________________

Spouses Occupation: ________________________ Employer: ________________________

If spouse passed away this year, date of death: ________________________

Name: ____

Address: ____

City, ST Zip: ____

Subject: Preparation of Your **2017** Income Tax Returns

Dear Client:

Thank you for choosing TechandTaxes LLC to assist you with your 2017 income taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2017 federal and any required state income tax returns**.** We will 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. A Checklist is enclosed to help you collect the data required for your return. The checklist will help you avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare your tax returns. 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. Invoices are due and payable upon presentation.

We will return your original records to you at the end of this engagement. 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 engagement to prepare your 2017 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us with your tax documents or via fax at 803-753-9742. We appreciate your confidence in us. Please call 843-847-6213 if you have questions.

Sincerely,

Stacye Bottoms
TechandTaxes LLC

Accepted By:

______________________	______________________	____________
Taxpayer	Spouse	Date

(Both spouses must sign for preparation of joint returns.)