



2018 Tax Checklist for Tax Prep

Please take a look at the items you will need for

Thank you for Choosing Flagtaff Synergy Solutions LLC!

✓ check off as complete

Primary (this name will be listed 1st)	Secondary	
		<input type="checkbox"/> Name
		<input type="checkbox"/> Phone Number
		<input type="checkbox"/> Email Address
		<input type="checkbox"/> Best Contact
		<input type="checkbox"/> Last year tax return (unless we filed it for you)
		<input type="checkbox"/> Birthday
		<input type="checkbox"/> Social Security Number
		<input type="checkbox"/> Address
Single   Married   Head of Household		<input type="checkbox"/> Filing Status (circle one)
	1	3 <input type="checkbox"/> Dependents - Social and DOB
	2	4 <input type="checkbox"/> Driver's License # (DL#, State, issue date, exp date)
		<input type="checkbox"/> 1095A (the healthcare form)
		<input type="checkbox"/> W2 (unless we prepared your W2's)
		<input type="checkbox"/> K1 (unless we prepared your business returns)
		<input type="checkbox"/> Do you rent property? Include expenses & income
		<input type="checkbox"/> Are you self employed? Include expenses & income
		<input type="checkbox"/> 1099
		<input type="checkbox"/> 1099-Int
		<input type="checkbox"/> 1099-B
		<input type="checkbox"/> Other Investment Information
Total:		<input type="checkbox"/> Education-Interest or Expense-include forms 1098
Total:		<input type="checkbox"/> Employee Expenses
Total:		<input type="checkbox"/> Medical Dental Expenses
		<input type="checkbox"/> Personal income, sales and property taxes
Total:		<input type="checkbox"/> estimated tax payments?
		<input type="checkbox"/> Mortgage Statement
Total Cash:	Total Non-Cash:	<input type="checkbox"/> Gifts to Charity
		<input type="checkbox"/> Signed Engagement Letter
		<input type="checkbox"/> Paper Return Copy

Upon receipt of these items, we will have more questions and want to review the tax return with you.

If you have any questions at all, please don't hesitate to call our office or email us a [synergytaxprep@gmail.com](mailto:synergytaxprep@gmail.com)