

Contractor / Small Business

1. Business Application Form (form is on our website)
2. Commissions
3. Estimated Tax Paid - Federal & State
4. Business Expenses (supplies, equipment, etc.)
5. Advertising
6. Legal Expenses
7. Rent Expenses
8. Office Supplies (internet, paper, pens, fax cartridges, printer cartridges, etc.)
9. Business/Cell Phone
10. Car Mileage
11. Car Repairs/Expenses
12. Insurance Expenses - Health, Dental, Vision, Liability, etc.
13. Square Foot - Home Office
14. Square Foot - Entire Home
15. Home Repairs
16. HOA/Condo Fees
17. Utilities Expenses (alarm, gas, water, electric, sanitation, home warranty, etc.)

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Rental Property

1. Rents Received - 1099MISC
2. New Purchase/Refinance/Sale (please provide HUD1 Settlement Statement)
3. 1098 - Mortgage Interest
4. RE Property Tax - City & County
5. Appraisal Expenses
6. Advertising Expenses
7. Cleaning & Maintenance Expenses
8. Commissions Expenses
9. HOA & Condo Fees
10. Insurance Expenses
11. Legal & Professional Fees
12. Management Fees
13. Repairs Expense
14. Supplies Expense
15. Utilities Expenses (alarm, gas, water, electric, sanitation, home warranty, etc.)
16. Mileage - Travel to Rental Property To & From

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Business / Corporations

1. Business Application Form (form is on our website)
2. Last Year's Tax Return Including All Forms/Schedules - **(first time clients only)**
3. Cost of Last Year's Tax Preparation Fee - **(first year clients only)**
4. Business Income
5. Financial Statements - Balance Sheet and Income Statement
6. Bank Statements (please download in Quicken, Quickbooks, or Excel)
7. Business Expenses
8. List of Assets Purchased During Year (please include asset name, date of purchase, and amount)
9. Office Expenses (rent, utilities, etc.)
10. Contractors - 1096 Forms, 1099Misc Forms
11. Employees - Year End Payroll Report, W3, 941, G7

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