

# Legend Tax

## *Appointment Checklist*

Being prepared is the first step in having a successful tax appointment. Browse through this all-inclusive checklist to find items that may apply to your specific tax situation. Our personalized one-on-one approach allows us to help you navigate through the multitude of tax forms and customize a tax structure to maximize your tax benefits. A private consultation with one of our trained professionals is just a phone call away.

### PERSONAL

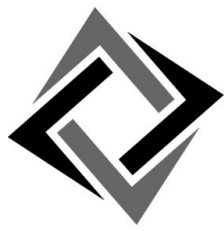
- Most Recently Filed Tax Return
- Tax Forms (Mailed by January 31)
  - *W2*: Employee Earnings
  - *1099-MISC*: Self-Employment Earnings
  - *Form 1098*: Mortgage Statement
  - *1099-B*: Stock Brokerage
  - *1099-C*: Cancellation of Debt
  - *1099-DIV*: Dividends
  - *1099-G*: Government
  - *1099-INT*: Interest
  - *1099-R*: Retirement
  - *1099-B*: Stock Transactions
- Social Security Numbers (Taxpayer, Spouse, Dependents)
- Birthdays (Taxpayer, Spouse, Dependents)
- DMV Fees
- Charity
  - *Cash Contribution Letters* (Church, Non-Profit)
  - *Non-Cash Contributions* (Goodwill, AMVETS, Salvation Army)
- Property Tax Statements (Two Statements Per Year)
- Primary Home and Rental Property Transactions
  - *Purchase* – Purchase escrow statement
  - *Sale* –Purchase escrow statement
  - *Refinance* – Refinance escrow statement
  - *1031 Exchange* – Exchange accommodator paperwork, Purchase escrow, and sale escrow
- Day Care
  - Employer Identification Number (EIN)
  - Address
  - Phone Number
  - Amount Spent per Child

### BUSINESS

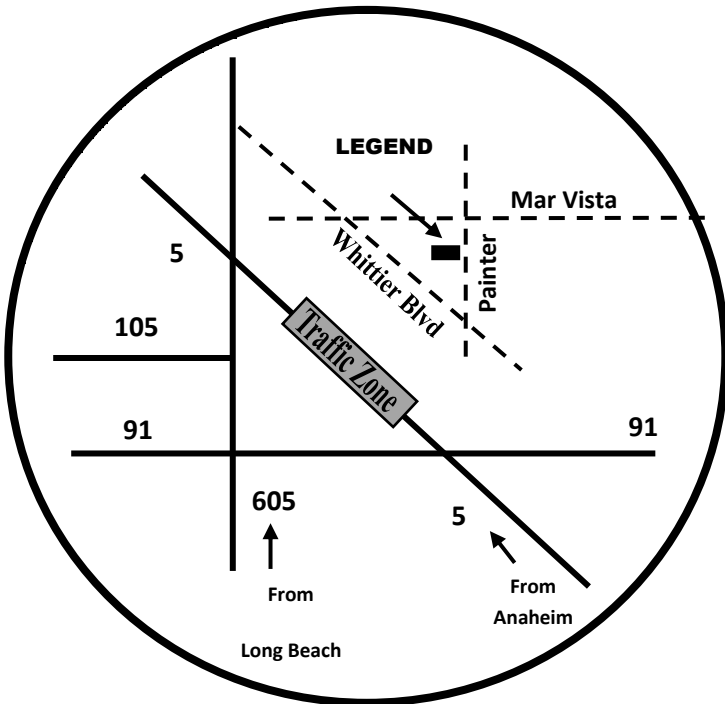
- Income Statement – Summarize revenue and expenses by tallying bank deposits and receipts. Download the Services Worksheet from our website as a guide
- QuickBooks Reports – Print income statement and balance sheet reports on cash basis
- Corporate /LLC Binder
- 1099-MISC Request Form

### RENTAL

- Rental Property Income Statement Worksheet
- Mileage Log



# LEGEND TAX



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