

Andrew T Schuck IV

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DOCUMENTS/ITEMS NEEDED

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PERSONAL DOCUMENTS CHECKLIST

Bring/Send All of the Following (if applicable)

IRS Forms

- _____ Previous Years Tax Return
- _____ W2's
- _____ 1099 - INT
- _____ 1099 - DIV
- _____ 1099 - MISC
- _____ 1099 - B
- _____ 1099 - R
- _____ 1099 - G
- _____ 1099 - SA
- _____ 1098 - T
- _____ K-1's
- _____ IRS Notices (if applicable)

Non IRS Items

- _____ Please Bring in copies of all Charitable Contributions whether cash or non-cash
- _____ Bring Settlement Statement for Home Purchase/Sales done in current year

BUSINESS DOCUMENTS CHECKLIST

Bring/Send All of the Following (if applicable)

IRS Forms

- _____ Previous Years Tax Return
- _____ 1099 - MISC
- _____ 941 (4 Quarters)
- _____ 940
- _____ W3/W2's
- _____ Unemployment Reports (4 quarters)
- _____ IRS Notices (if applicable)

Non IRS Items

- _____ Please provide Financial Statements, QuickBooks File, or complete the *Business TDO*
- _____ Please Bring in copies of all QB or Quicken File (if applicable)
- _____ Current year Bank Statements (If FS/QB File...12/31 if Business TDO Completed)
- _____ Current year Credit Card Statements (If FS/QB File...12/31 if Business TDO Completed)
- _____ Lines of Credit/Loans Payable (If FS/QB File...12/31 if Business TDO Completed)
- _____ Sales Tax Reports (If FS/QB File...12/31 if Business TDO Completed)