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Tax Preparation Checklist

- 1. W2's
- 2. 1099's
- 3. Date of Birth for all included on tax return
- 4. Social Security #'s for all included on tax return
- 5. Mortgage Interest Statement(s) (if applicable)
- 6. Property Taxes (if applicable)
- 7. Moving Expenses (if applicable)
- 8. Daycare Expenses (Name, address, tax id #, amount paid)
- 9. Charitable Contributions (if itemizing or business income)
- 10. Medical Expenses (if itemizing)
- 11. Education statements - 1098 (if applicable)
- 12. Business Expenses for 1099 income (i.e. supplies, rent, contract labor, travel, business meals, insurance, permits, continuing education/training, professional fees, business taxes paid, printing, postage, uniforms, memberships, dues and subscriptions, etc.) If you have additional expenses not included above be sure to ask about.
- 13. Mileage Log with grand total for year and total business miles
- 14. Health & Dental Insurance Premium Payments and/or 1095-A, 1095-B or 1095-C
- 15. Business Use of Home: Square footage of entire home, Square footage of space used for business
 - a. Electric bill total paid for the year
 - b. Gas bill total paid for the year
 - c. Water & Sewer total paid for the year
 - d. Telephone bill total paid for the year
 - e. Internet and Cable
 - f. Lawn Maintenance
 - g. Repairs & Maintenance
 - h. Rent (if applicable)
- 16. Cell Phone bill total paid for year (if applicable) and % used for Business
- 17. Tax Preparation Fees (if applicable)
- 18. Copy of last year tax return (New Clients)
- 19. QuickBooks Company Backup or whatever Accounting Software used