

# > Tax Prep CHECKLISTS

## Address

8264 Ferguson Rd.  
#570028  
Dallas, Tx. 75357

## Contact Us

972.913.6807  
972.920.3444  
jrtaxservices83@gmail.com

### BASIC FOR ALL FILERS

- ☐ Full Names (yourself & dependents)
- ☐ Social Security Cards or ITIN's (yourself & dependents)
- ☐ Valid Identifications (anyone over 21 yrs old)
- ☐ Birth Certificates (only for minor children)

### HOME & RENTAL PROPERTIES

- ☐ 1098s: Interest on mortgage, equity or student loans
- ☐ Insurance premiums
- ☐ Energy efficient upgrade receipts
- ☐ Purchase/sale records (home, rental property, etc.)
- ☐ Rental Income
- ☐ Mileage (rental related issues)
- ☐ Receipts: for rental upgrades, reports, upgrades, etc.
- ☐ Paid real estate taxes

### BUSINESS OWNERS

- ☐ Tax ID
- ☐ insurance premiums and/or expenses
- ☐ Business income and expenses
- ☐ list of assets and equipment
- ☐ mileage logs

### Donations

- ☐ Charitable contributions receipts
- ☐ Volunteer expense deductions

### INCOME

- ☐ W-2s
- ☐ 1099s for all forms of income
- ☐ Other income sources

### OTHER MISC.

- ☐ Record of estimated tax payments
- ☐ IRA/401K total contributions

NOTES



**J R TAX SERVICES**  
"SIMPLIFYING TAXES, MAXIMIZING RETURNS"