Thank you for choosing Tactical Tax, we are happy that we can assist you with the proper knowledge & useful information to accurately file your personal & business taxes!

Please ensure that all information provided for your tax return is accurate and up to date to the best of your ability. Keep in mind that tax returns should reflect any changes in income, deductions, or other financial details each year, as identical filings may raise concerns with tax authorities.

If you are a returning client and need your previous year(s) income/expense sheet we will provide that for you. Please use the email that is provided below to request it.

*****As consideration for both your time & ours, we will require an upfront deposit of $99. This 1X non-refundable deposit of $99 will go towards your tax prep fee that you will pay after we've completed inputting your tax information.*****

Please zelle your deposit to: tacticaltaxprep@gmail.com

CHECKLIST:

Personal Information

- ☐ Legal Full Name (On Social Security Card)
- ☐ SSN or Tax ID Number
- ☐ Spouse's Full Name, SSN/Tax ID Number & Drivers License
- ☐ Identity Protection PIN (if one has been issued to you, your spouse, or your dependent by the IRS)
- ☐ **Picture of Identification Card (I.D)/ License**
- ☐ 1095A (Health Insurance)
- ☐ Previous Year Tax Return (If Available)
- ☐ Received Stimulus

Dependant's Information: ****Please verify & confirm by signing below that you do have the right to claim all dependents listed because you have met the law requirements****

- ☐ Full Name(s), Birthdate(s), SSN(s)

- ☐ Childcare records (including the provider's **tax ID number**) if applicable
- ☐ **Name & Address** of childcare provider
- ☐ **Amount** paid to childcare provider(s)
- ☐ Income of dependents and of other adults in your home
- ☐ How many days has the dependent lived with you?

Educators & Students

- ☐ Teacher Supply Expenses:
- ☐ 1098T (Education Form)

Employed

- ☐ Forms W-2

Unemployed

- ☐ Unemployment (1099-G)

Self Employed ****This section must be filled out in its entirety UNLESS you have an up-to-date P&L Statement**

- ☐ Profit & Loss Statements
- ☐ Business(s) EIN Number
- ☐ Business Type or Description
- ☐ Business Name & Address
- ☐ Self Employment Total Gross Income
- ☐ Forms 1099, Schedule K-1, Income records to verify amounts not reported on 1099-MISC or new 1099 NEC
- ☐ Car Make & Model (If Driven For Business Purposes) &
- ☐ What % of car usage was for business use?
- ☐ Mileage driven:
- ☐ Date started using vehicle for business:
- ☐ Home (Office) SqFt:
- ☐ **Total** SqFt of Home:
- ☐ Office Expense
- ☐ Business Phone Bill & % used for business
- ☐ Business Travel
- ☐ Total Supplies Expenses
- ☐ Meals
- ☐ Rent Or Lease Of Equipment
- ☐ Taxes & Licenses

- ☐ Rent or Lease Of Property
- ☐ Utilities
- ☐ Advertisement
- ☐ Contract Labor
- ☐ Repairs and Maintenance
- ☐ Depletion
- ☐ Employee Benefit Program
- ☐ Legal and Professional Fees
- ☐ Commission and fees
- ☐ Mortgage Interest
- ☐ Other Expenses

Rental Income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation
- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Retirement Income
- ☐ Pension/IRA/Annuity income (1099-R)
- ☐ Traditional IRA Basis (i.e., amounts you contributed to the IRA that were already taxed)
- ☐ Social Security/RRB Income: SSA-1099, RRB-1099

Savings & Investments or Dividends

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition & records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Health Savings Account & long term care reimbursements (1099-SA or 1099-LTC)
- ☐ Expenses related to your investments
- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

- ☐ Gambling income (W-2G or records showing income as well as expense records)
- ☐ Jury duty
- ☐ Hobby Income & Expenses
- ☐ Prizes & Awards

- ☐ Trust Income
- ☐ Royalty Income (1099 MISC)
- ☐ Any other 1099s received
- ☐ State tax Refund

Home Ownership

- ☐ Form 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- ☐ All other 1098 series forms

Charitable Donations

- ☐ Cash amounts donated to house of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

Medical Expenses

- ☐ Amounts paid for healthcare, insurance, & to doctors, dentist & hospitals
- ☐ Health Insurance
- ☐ Form 1095-A if you enrolled in an insurance plan through the marketplace (Exchange)

Childcare Expenses

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- ☐ Amounts paid to a baby-sitter or provider care of the child under the age of 13 while you work
- ☐ Expenses paid through a dependent care flexible spending account at work
- ☐ Forms 1098-T
- ☐ Form 1098-E if you paid student loan interest

State & Local Taxes

- ☐ Amount of state and local income or sales tax paid (other than wage withholding
- ☐ Invoice showing amount of vehicle sales tax paid and/or personal personal property tax on vehicles

Retirement & Other Savings

- ☐ Form 5498-SA showing HSA Contributions
- ☐ Form 5489 showing IRA Contribution
- ☐ All other 5498 (5498-OA, 5498-ESA
- ☐ Federally Declared Disaster

- [ ] CIty/County you lived/work/had property in
- [ ] Records to support property losses (appraisals, clean-up cost, etc.)
- [ ] Records of rebuilding/repair cost
- [ ] Insurance reimbursements/claims to be paid
- [ ] FEMA assistance program
- [ ] Check the FEMA website to see if your country has been declared a federal disaster areas

Signature: ____ Date: __________________

Thank you for choosing Tactical Tax Service to assist you with filing your taxes, please contact us if you have any questions in regards to any of these documents.

Email: tacticaltaxprep@gmail.com
Phone: (404) 649-2001

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TAX SERVICE