Davis & Associates, Inc

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Below is a list of documents that we need in order to provide you with accurately prepared tax returns:

1. New clients: Two prior years of completed tax returns
2. Any correspondence that you received from the IRS, or state taxing authority, this year
3. Any W-2's, 1099's, K-1's, 1098's, or Important Tax Statements that you may have received.
4. Year End Tax Statements for any investments you own
5. Any divorce decrees, separation agreements, and/or court custody arrangements
6. Social Security Numbers, Legal Names, and Dates of Birth for yourself and any dependents
7. If you refinanced your house we need closing HUD's

If you own your own business:

1. Business bank statements for the years that we are filing unless you are providing financial statements.
2. If you are using QuickBooks we need a FULL back up. **Not an Accountants Copy**
3. Total Income for the year – this should be equal to or greater than the total amount of business bank account deposits for the year
4. Expenses for the year categorized completely
5. A list of any loans that you have made to the business or that the business had made to you.
6. Any correspondence that you have received from the IRS or State this past year
7. Corporate documents (if we don't already have copies)
8. Interest Paid year to date on any business loans
9. Vehicle Mileage Log - We can not deduct your vehicle expenses unless we see this
10. List of any equipment purchases that you made over $ 100.00
11. Any other business financial information that you may have.
12. If you have rental real estate we need copies of any purchase and/or sale and/or refinance HUD-1's
13. A copy of a detailed asset schedule from your last accountant