

# TAX SUBMISSION CHECKLIST

## PERSONAL RETURNS

Are we doing your personal returns? If so, please submit:

- Personal Organizer
- Engagement Letters
- Source Documents such as W-2s, 1099s, 1098s if applicable
- Prior Year Returns (New Clients Only)

## BUSINESS RETURNS

Are we doing your business returns? If so, please submit:

- Business Organizer
- Engagement Letters
- Prior Year Returns if applicable (New Clients Only)

## RENTALS

Did you have Rentals? If so, please submit:

- Rental Organizer
- Closing Documents if a new rental

## FLIPPED PROPERTY

Did you flip a property? If so, please submit:

- Flip Organizer

## NON US CITIZEN

Are you a Non US Citizen with a US Based Entity ? If so, please submit:

- Non US Organizer
- Business Organizer
- Engagement Letters
- Prior Year Returns if applicable (New Clients Only)