

THINGS TO CONSIDER AND BRING TO YOUR TAX APPOINTMENT. CONTACT OUR OFFICE IF YOU HAVE ANY QUESTIONS 305-290-5529. SEE ALSO CLIENT INTAKE PACKET.

EITC/HEAD OF HOUSEHOLD/CTC/ODC	AOTC	Small Business
<ul style="list-style-type: none"> • Social Security cards required • birth certificate required • school or doctor statement • lease showing the residents (HOH) Dependents, address (more than 6 mos.) placement agency • Form 8332 • Utility bill • Rent Receipts <p>Types of documents proves status and maximum credit eligibility.</p>	<ul style="list-style-type: none"> • Form 1098 T • billing and payment summary for the University • receipts from the school to substantiate 1098T • Loan Disbursement schedule • Receipts for Books and or course materials 	<p>If you have a small business to be reported on Schedule C it will be required for you to supply documentation to substantiate your business. Please complete the due diligence questionnaire.</p> <p>We will need EITHER OF THE following items, in order to complete an accurate return for your business.</p> <ul style="list-style-type: none"> • Copy of Business License, if you have Form 1099 Misc. • Business Card or Flyers • Record of Gross income & Expenses /Your Summary of Income & Expense • profit & loss statement from comp. software (Quicken or QuickBooks) or manually notation.

<p>o Personal Information Required -</p> <ul style="list-style-type: none"> • Social Assistance Income • Pension/Annuity/Stock or Bond Sales • Contract/Partnership/Trust/Estate Income • Gambling/Lottery Winnings and Losses/Prizes/Bonus • Alimony Income, Rental Income • Self-Employment/Tips. Foreign Income <p>o Expense Data Required -</p> <ul style="list-style-type: none"> • Dependent Care Costs • Education/Tuition Costs/Materials Purchased 	<p>o Personal Information Required -</p> <ul style="list-style-type: none"> • Last year's income tax if you are a new client • Name, address, Social Security number and Date of Birth for yourself, spouse and dependents • Dependent Provider, Name, Address, Tax ID and S.S.N. • Banking information if Direct Deposit Required <p>o Income Data Required -</p> <ul style="list-style-type: none"> • Wages and/or Unemployment • Interest and/or Dividend Income • State/Local income tax refunded
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We pride our business with Integrity and honesty, educating our clients, keeping them informed and satisfied.

"Our Expertise is our Clients greatest Experience"