

# Tax Preparation Checklist

"Alone we can do so little, together we can do so much"

-Helen Keller

- Provide prior year return for review and assessment if you're a new or returning client
- Provide a [completed your personal and business tax organizer](#)
  - Use organizer to **report any life changes you experienced** during the tax year (i.e. new baby, divorce, marriage, etc.)
  - Use organizer to **report any business changes you experienced** (i.e. started a new business, closed a business, etc.)
- If you started a business - document your income and expenses
  - Let us know if you need us to perform any bookkeeping clean-up services
  - If your bookkeeping is up-to-date, provide financials or provide access to your accounting software
- Confirm the amounts paid for estimated taxes during the year, if applicable
- Provide tax documents (W-2's, 1098's, 1099's, etc) - be sure to include all W-2's for multiple jobs you had during the year, if applicable
  - Report any unemployment income or interest/dividends earned - often forgotten about :)
- If you lost your tax documents, [request a wage transcript from the IRS](#)
- [Upload your tax documents to AEMC](#)
- [Schedule a quick chat](#) for questions about pricing and other inquiries

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