
GETTING STARTED CHECKLIST

5 Easy Steps (for Previous Clients Only)

PRE-START THE PROCESS OF YOUR CURRENT YEAR INCOME TAX

PREPARATION ON-LINE AS FOLLOWS:

- Step 1 Complete Update/Questionnaire

- Step 2 Scan all current year documents to be used in preparation

 (see list of income documents to submit)

- Step 3 Email all information to taxes@OurProfessionalServices.com

- Step 4 Call **718-953-6455** to confirm clarity, receipt of information, choice of filing option, and date to come by for completion of all work.

- Step 5 Printout email confirmation, bring it along with original documents to office, then sign & pick up completed work.

SMALL BUSINESS REQUIREMENTS

For Schedule C' Preparation;

Total Gross Receipts

Business Category

Business Name

Business Address (if different)

Tax ID # (if you have one)

Itemized Business Expenses (call for fax worksheet by category)

 or complete Sorted Document form

Documented Proof of Income & Expenses

(We do not require all originals for filing, however, we do ask that you please sort and copy them, record & keep them in a safe place to justify entries if needed at later date)

For LLC, Partnerships or S Corporation Preparation;

Same as above and **Also,**

Name, SSN# and address for all business partners

Business bank statements (may be required for balance sheet)

For New Property/Home Owner Deductions;

1st time home-buyers credit up to \$8,000 if you purchase before Dec. 1, 2009

Single family homes –

Mortgage interest statement,

Real Estate Property Tax statement

Original purchase date and amount paid or

Last refinance date & amount

(if refinanced or purchased in current year, include closing statement)

Please be advised that if you sold home/property

Multiple dwellings (2 family or more) Also complete

Homeowner Deduction/Expense form for rental property

Itemize list of renovations, repairs, home improvements, include property address

Vacation home/Time shares; Interest paid and or taxes

NON-DEDUCTIBLE EXPENSES

Burial or Funeral Cost

Commuting (unless 2nd job)

Marriage/Weddings

Personal Fines tickets & Penalties

Life Insurance premiums

Personal apartment rent

Pets (unless seeing-eye dog)