

# FREEDOM TAX & ACCOUNTING SERVICES, INC.

## TAX RETURN CHECKLIST

CLIENT NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

<u>CLIENT'S INFORMATION</u>	<u>QUANTITY</u>
• W-2's	
• 1099 Misc	
• 1099 R	
• 1099 SSA	
• 1099 INT	
• 1099 DIV	
• 1009 G	
• 1098	
• 1098 T	
• EMPLOYEE EXPENSE WORKSHEETS	
• OTHER	

Explanations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Under the penalties of perjury, I, \_\_\_\_\_, state that all of the information given to the tax preparer is correct and all documents have been provided accordingly.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date