KASE CONSULTING
STRATEGIES ~ SOLUTIONS ~ SUCCESS

# New Client Tax Checklist
## INDIVIDUAL | SCHEDULE C

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To ensure a smooth filing process, please use this checklist as a guide for the information and documents we may request to prepare your tax return

Don't worry ... we will ensure all available credits & deductions are maximized prior to filing!

## NEW CLIENT REQUIRED INFORMATION

- ☐ Copy of prior year return (Unless 1st time filer)
- ☐ IP PIN issued by IRS (If applicable)
- ☐ Copy of Drivers License (Or other ID)
- ☐ Names, DoB, SSN for all individuals/dependents

## PERSONAL

### Individual

- ☐ Name
- ☐ Address
- ☐ Occupation
- ☐ DOB
- ☐ SSN
- ☐ Marital Status

### Spouse

- Filing Separately or Jointly?
- Spouse Name
- Occupation
- DOB
- SSN

### Dependents

- ☐ Name
- ☐ DOB
- ☐ SSN
- ☐ Relationship?
- ☐ Can anyone else claim dependent on tax return?
- ☐ How many months did dependent live in your home?
- Are they employed? (Form W-2, 1099)

## INCOME

### Common

- ☐ Wages and Salaries (Form W-2, 1099)
- ☐ Investments /Savings (1099-INT, 1099-DIV, 1099-B)
- ☐ Unemployment Compensation (Form 1099-G)
- ☐ Social Security Benefits (Form SSA-1099)
- ☐ Retirement Income (Form 1099-R)
- ☐ Taxable State Refund (Form 1099-G)

### Other Income

- ☐ Rental Income (Schedule E)
- ☐ Farm Income (Schedule F) Farm Rental (Form 4835)
- ☐ Estate or Trust Income (Schedule K-1)
- ☐ Sale of Main Home or Sale of Business Assets

## DEDUCTIONS | CREDITS

### Common

- ☐ Medical Expenses *(Premiums/Doctor/Prescriptions/Misc)*
  *Examples of miscellaneous deductible medical expenses include: acupuncture, treatment, ambulance, birth control, child birth classes, dentures, and physical therapy.*
- ☐ Homeowner (Form 1098) - Including PMI for 2026!
- ☐ Donations to charities (Cash/NonCash)

### Other Credits

- ☐ Home Energy *(Solar, Doors, Windows, Insulation, Electric)*
- ☐ Child Care *(Name, Address, EIN or SSN of caregiver)*

### Education

- ☐ College Tuition (Form 1098-T)
- ☐ Did you pay for books, supplies, etc?
- ☐ Did you pay fees for school sports or activities?
- ☐ Has the student taken the following credits?
  - American Opportunity Tax Credit (AOTC)
  - Lifetime Learning Credit (LLC)
- ☐ Student Loan (Form 1098 - E)
- ☐ Teacher expenses for supplies/books/materials

## BUSINESS INFORMATION

### General - This applies to Self Employed AND Side-Gigs!

- ☐ Business Name
- ☐ EIN (SSN used if no EIN)
- ☐ Address (if different than home address)
- ☐ Percentage of ownership
- ☐ Type (or nature of) of business
- ☐ Business start date

### Income - We ensure you never over-claim income!

- ☐ Gross Receipts/Sales
- ☐ Returns, rebates, refunds
- ☐ Form 1099-NEC and Form 1099-MISC Income
- ☐ Form 1099-K Income (Square, Venmo)
- ☐ Business Income (Cash - Not reported on 1099)
- ☐ Partnership 1065 Income (Schedule K-1)
- ☐ S Corporation Income (Schedule K-1)

### Expenses

- ☐ W2 and 1099 Payments

#### Administrative

- ☐ Repairs and maintenance
- ☐ Business Travel/Meals
- ☐ Insurance (other than health)
- ☐ Taxes & Licensing
- ☐ Legal / Professional Services

#### Operation Expenses

- ☐ Supplies
- ☐ Advertising
- ☐ Office Expense
- ☐ Utilities
- ☐ Internet
- ☐ Phone

#### Business Travel

- ☐ Meals
- ☐ Lodging

#### Vehicle Expenses

- ☐ Year, Make, Model
- ☐ Business Miles
- ☐ Personal Miles
- ☐ Insurance
- ☐ Fuel Cost
- ☐ Repairs

#### Depreciable Assets

- ☐ Equipment (List equipment/tools purchased this year)
  *List all equipment and tools utilized for the operation of your business, including approximate dates of purchase and purchase price.*

#### Home Office Expenses

- ☐ Total SF of home
- ☐ SF used for business
- ☐ Date you began home office usage
- ☐ Total Rent
- ☐ Total Utilities
- ☐ Office specific remodel amount

## MISC. *(Discuss with Accountant)*

- ☐ Alternative Fuel Vehicle
- ☐ Military
- ☐ Alimony
- ☐ HSA *(Health Savings Account)* - (Form 1099SA|5498SA)
- ☐ Disabled/Elderly (Schedule R)
- ☐ Adoption (Form 8839)