

Thank you for choosing AFP Consulting LLC for your tax preparation. The following checklist will be used in tandem with our questionnaire to help us prepare your tax return. Should you have any questions when filling out this form, please do not hesitate to contact us.

*The following is a list of forms that if applicable need to be enclosed **with your questionnaire**. Please take a moment after you have completed your questionnaire to see if you have enclosed all the needed items for us to complete your tax return. Once you have completed this form please feel free to forward it with your questionnaire*

Important Documents

US Driver's License or Passport
Social Security Card
IP PIN

Enclosed

on file newly enclosed
 on file newly enclosed
 yes not applicable

Wage Slips

W2s (United States)
T4s (Canada)
Foreign Wage Slip (Issued by team)
Team itineraries

yes no not applicable
 yes no not applicable
 yes no not applicable
 yes no not applicable

Bank Statements

1099INT (Interest)
1099DIV (Dividends)
1099-B (Stock proceeds from sales)
Cryptocurrency
T3 or T5 *Canadian
Foreign Bank Statements (only if it exceeded \$10,000 US)

yes no not applicable
 yes no not applicable
 yes no not applicable
 bought held sold none
 yes no not applicable
 yes no not applicable

- Foreign accounts I need account number & average balance for year

Other Income

1099NEC/1099MISC (endorsement, self-employment)
1099-G (State tax refund and unemployment/leave pay)
1099-R (IRA/401(k) withdrawals)

yes no not applicable
 yes no not applicable
 yes no not applicable

Dependent Care/Higher Education

Dependent Care Receipts
1098-E (Student loan interest)
1098-T (Tuition)
529 Plans

yes no not applicable
 yes no not applicable
 yes no not applicable
 contribute withdrew - 1099Q

Mortgage Interest & Taxes

1098MIS (Mortgage statement)
Property tax receipt

yes no not applicable
 yes no not applicable

Business or Employee Expenses

Receipts

yes no not applicable

Health Coverage

1095-A

yes no not applicable

Charitable Contributions

Receipts

yes no not applicable