O'NEIL & STEINER, PLLC
CHECKLIST FOR TAX RETURN PACKETS

- Engagement Letter: Download and complete the engagement letter for your marital status (red buttons) on our tax documents page.

- Information Changes: Alert your preparer with notes regarding changes to your marital status, dependents/household members, bank account for direct deposit of refunds, mailing address, telephone, email address, etc..

- Complete Tax Packet: Review your records and consider activity for the prior year to determine if you the following included in your packet:

    - Income Forms: Do you have all the forms W-2, 1099-Int, 1099-Div, 1099-B, 1099-R, 1099-G, 1099-Misc, SSA-1099, Schedules K-1, etc. you expected for the year? Have you reviewed and recorded income not reported to you on tax forms (rental income, self-employed income, alimony, etc.)?

    - Deductions: Have you reviewed and recorded total amounts paid for deductible items (medical expenses, real estate taxes, sales tax on the purchase of vehicles/boats, vehicle license portion of auto registration, cash charitable donations, non-cash charitable donations, etc.)? Have you reviewed the returning client organizer and prior year returns to identify potential missing items specific to your circumstances (teacher deductions, IRA and/or HSA contributions, moving expenses, alimony paid, etc.)?

    - Organizers: Did you use and/or review the organizers available for self-employed income, rental property, home office expenses, moving expenses, college expenses, vehicle mileage recap, and cancellation of debt income?

- Tax Credit Contributions: If you plan to make an AZ Tax Credit contribution between now and the April 15^{th} deadline please be sure to list the recipient organization and dollar amounts with your return information.

- Retirement/Health Savings Contributions: If you plan to make a tax deductible contribution to your Individual Retirement Account (IRA) prior to the April 18^{th} deadline please communicate the type of account (Traditional, Roth, HSA, etc.)

By submitting a complete tax return you reduce the need for your CPA to seek additional information and/or forms you not only will contribute to a more efficient system (you get your returns completed faster), but also reduce the time necessary to prepare your return saving you money.