AAA Tax Plus LLC DBA Bee Wise Tax & More
5302 Plank Road, Fredericksburg, VA 22407

Taxes General Checklist

There are different types of taxes, and each require a unique set of items to properly file. This general checklist provides a high-level overview of the items required based on the type of tax filling (e.g., individual, business, estate). Please make sure to bring the PREVIOUS YEARS TAXES regardless of type if you're new to our office. This DOES NOT address ALL ITEMS.

Individual Taxes

- ☐ Employer W2 Form and/or 1099 Form for all jobs
- ☐ Side-Job's income over $300 dollars (i.e., miscellaneous income)
- ☐ Miscellaneous Income (e.g., gambling winnings, MSA or HAS distributions, broker or barter exchanges)
- ☐ Personal Mortgage and bank interest statements
- ☐ Government Payment Records (i.e., Social Security, Disability, Pension, Retirement)
- ☐ Daycare and/or after-school care annual expenses
- ☐ Dependents information (i.e, SSN, DOB)

Business Taxes

- ☐ Bookkeeping Records – Annual Summary of Profit and Losses
- ☐ Quarterly Tax Payment Records
- ☐ Deductibles – Complete list of items that can be deducted
- ☐ Bank Tax Statements
- ☐ EIN Number

Estate Taxes

- ☐ Durable Power of Attorney Documents (if applicable)
- ☐ Will and/or Certificate of Death
- ☐ Complete STATEMENTS of ALL INCOME, including deductibles associated with the ESTATE.
- ☐ The Estate's EIN and/or tax identification number. If none in place, follow the steps noted at https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online
- ☐ The Latest Estate Value, not older than 6month and/or the value of the Estate at the time of death.