

Tax Preparation Task Checklist

I. Document Collection

1. Gather all income-related documents:

- ☐ W-2s (wages and salary)
- ☐ 1099s (freelance, contractor, or other non-employee compensation)
- ☐ 1098s (mortgage interest, student loan interest)
- ☐ Bank statements and dividend income records

2. Collect other financial documents:

- ☐ Receipts for deductible expenses (e.g., medical, charitable donations)
- ☐ Records of any real estate transactions or home sales
- ☐ Investment and retirement account statements
- ☐ Childcare and education expense documentation

3. Review prior-year tax returns for reference.

II. Income Verification

- ☐ Confirm total income from all sources (salary, freelance work, investment income).
 - ☐ Verify self-employment income (1099 forms, invoices, and other records).
 - ☐ Ensure any other sources of income are accounted for (rentals, dividends, interest).
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Tax Preparation Manual Template

JL Elias



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Tax Preparation Manual Template Book Review: Unveiling the Magic of Language

In an electronic era where connections and knowledge reign supreme, the enchanting power of language has been apparent than ever. Its capability to stir emotions, provoke thought, and instigate transformation is really remarkable. This extraordinary book, aptly titled "**Tax Preparation Manual Template**," written by a highly acclaimed author, immerses readers in a captivating exploration of the significance of language and its profound affect on our existence. Throughout this critique, we will delve into the book's central themes, evaluate its unique writing style, and assess its overall influence on its readership.

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