

## TAX RETURN COMPLETION CHECKLIST

### Keep in your file folder

Check if your folder contains	<b>Form</b>
	Copy of client's valid ID
	Copy of social security card for client and dependents, if available (preferred, but not required)
	Copy B and state copy of all W-2 and 1099 forms
	* Interview Sheet, completed, signed and dated by client
	** Form 8879 signed/dated by tax payer and tax preparer
	** Bank Application – signed and dated by tax payer and witness (for clients requesting a bank product)
	** TILA form – signed and dated by tax payer and witness (loans only)
	** Consent to Disclose form, signed by taxpayer
	*** EITC Due Diligence Questionnaire (optional unless non-standard dependents claimed for EITC)
	All returns with Child Care (day care) expenses to deduct *Child Care Credit Worksheet
	All returns with Itemized Deductions *Itemized Deduction (Sch A) Worksheet ***Itemized Deduction (Sch A) Questionnaire – page 1 & 2
	All returns with Self-Employment (Schedule C) income *Self-Employment (Sch C) Worksheet ***Self-Employment (Sch C) Questionnaire
	All returns with un-reimbursed work-related expenses *Work Related Deductions (Form 2106) worksheet
	All truck drivers who wish to claim expenses *Truck Driver Worksheet

\* Client/Taxpayer Worksheets found on the Training Page of the EZ-Tax Online website.

\*\* Form printed automatically when the return has the final printing.

\*\*\* Preparer Due Diligence Form found on the Training Page of the EZ-Tax Online website

### Give to Customer

Check if you gave customer	<b>Form</b>
	** Form 8879 signed/dated by tax payer and tax preparer
	Taxpayer copy of all W-2 and 1099 forms
	** Bank Application – signed and dated by tax payer and witness (for clients requesting a bank product)
	** TILA form – signed and dated by tax payer and witness (loans only)
	** Complete copy of the tax return