



Appointment Details

You can schedule Online at implextax.com or call 801-849-9699

Date: _____ Time: _____

Important Changes for this year

Don't forget to fill out the online engagement letters for business and personal

Married Filing Separate returns are no longer free. The 2nd return (split return) is \$50

Audit Protection and Tax Tracking now available

Important Tax Documents

W-2's

Donation Statements

1095 A B C

1098 INT T

Daycare Statement

Retirement Contributions

1099 Int Div Misc R C G

Mortgage Interest/Property Tax

Alimony paid/received

Social Security Statement

K-1 from business

Total Medical Costs

HSA Documents

Rental Property Income/Expenses

Moving Expenses

Other Documents if there was a change during the tax year

Divorce Decree

Marriage license

HUD Statement from a refinanced loan

HUD Statement from a new loan

Previous Years Tax Return (unless I did it)

Personal Documents needed

Picture of each Driver's License

Social Security Cards

Birthdays

Medical or School record to show where the dependent lived

Business Documents Needed

Profit & Loss Statement or Categorized Expense Totals

Balance Sheet

Trade Income

Sales Tax Paid Forms

1099's Received

1099/1096 Issued

W-2/W-3 Issued

Previous Years Tax Return including depreciation schedule (unless I did it)

Retirement Contributions

Other Info you are including or questions you have