



Astron Business and Tax Services, LLC

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Personal Income Tax Checklist

We may need the following information to complete your taxes:

*All may not apply to everyone

- Copy of your drivers License
- Copy of Spouse's License
- Copy of your Social Security Card
- Copy of dependants & Spouse's Social Security Card
- Client information sheet
- Tax Organizer
- W2's
- 1099's (R, G, INT, MISC.)
- 1098's (Interest Statements)
- Medical
(Hospital & Doctor bills, Drugs, Dental, Vision, Weight loss/gain, Rehab, special groceries, Sugar, AAA, etc.)
- Education Expenses
- Student Loan Interest
- Alimony (Paid or Received)
- Business/Farm Income
- Pension
- Unemployment
- Prizes & Scholarships
- Charity & Church donations
- Work Expenses
- Federal Tax Payments
- Child Care
- Rental Income

If you have any questions or comments, please do not hesitate to call.

PLEASE DO NOT SEND RECEIPTS. WE ONLY NEED THE RECEIPT TOTALS.

THANK YOU!