



UNITED STATES TAX SERVICES

Document Checklist of Current Clients

Our Address: 800 E. Northwest Highway, Suite 1090 Palatine, IL 60074
Office (800) 913-0809; SMS messages (224) 676-3577, Fax (847) 586-0268

Your Name, Last Name: _____

e-mail address: _____

List of the information we need:

- 1 All forms you received from employers this year (1099 or W2)
- 2 Expenses list for 1099 (expenses sheet is attached)
- 3 If you were unemployed, Form 1099-G
- 4 If you have a mortgage, Form 1098 and the amount you paid for property taxes
- 5 If any family member went to college, Form 1098-t
- 6 If you pay for health insurance monthly, 1095 Form
- 7 If you have a corporation, income, and expenses

Also please prepare the following:

1. Your bank information (account and routing number) if you would like to pay your balance due or receive your refund directly to your account
2. Please check if you received the third stimulus check and the amount
3. If you qualify for Child Tax Credit Payments in 20xx, please check the amounts you received

Depending on the forms you have, we will inform you of the price of our services after we review your documents.