



Thank you for choosing AFP Consulting LLC for your tax preparation. The following checklist shows the documents to include for us to prepare your tax return. Should you have any questions when filling out this form, please do not hesitate to contact us.

*The following is a list of forms that if applicable need to be enclosed **with your questionnaire**. Please take a moment after you have completed your questionnaire to see if you have enclosed all the needed items for us to complete your tax return. We do not need this document but we hope it provides guidance on what tax documents you may need to include.*

**Wage Slips**

- |   |  |
|---|--|
| W2s (United States)                     | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| T4s (Canada)                            | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| Foreign Wage Slip (Issued by team) Team | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| Itineraries (Include games missed)      | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |

**Enclosed**

**Bank Statements**

- |   |   |
|---|---|
| 1099-Int (Interest)   | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable                          |
| 1099-Div (Dividends)  | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable                          |
| 1099-B (Stock proceeds from sales)                                  | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable                          |
| T3 or T5 *Canadian  | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable                          |
| Foreign Bank Statements (only if combined exceed \$10,000 US)       | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable                          |
| • Foreign accounts I need account number & average balance for year |   |
| Cryptocurrency  | <input type="checkbox"/> Bought <input type="checkbox"/> Held <input type="checkbox"/> Sold <input type="checkbox"/> None |

**Other Income**

- |   |  |
|---|--|
| 1099-NEC (endorsement, self-employment)   | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| 1099-MISC (Rental, Royalty, Other Income) | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| 1099-G (State tax refund)                 | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| 1099-G (Unemployment)                     | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| K-1 (Partnership earnings)                | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |

**Higher Education**

- |                                |  |
|--------------------------------|--|
| 1098-E (Student loan interest) | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| 1098-T (Tuition)               | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |

**Mortgage Interest & Taxes**

- |                           |  |
|---------------------------|--|
| 1098 (Mortgage statement) | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
| Property tax receipt      | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |

**Business or Employee Expenses**

- |          |  |
|----------|--|
| Receipts | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
|----------|--|

**Health Coverage**

- |        |  |
|--------|--|
| 1095-A | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
|--------|--|

**Charitable Contributions**

- |          |  |
|----------|--|
| Receipts | <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable |
|----------|--|