



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

Enclosed

- W2s (United States) yes no not applicable
- T4s (Canada) yes no not applicable
- Foreign Wage Slip (Issued by team) Team yes no not applicable
- Itineraries (Include games missed) yes no not applicable

Bank Statements

- 1099-Int (Interest) yes no not applicable
- 1099-Div (Dividends) yes no not applicable
- 1099-B (Stock proceeds from sales) yes no not applicable
- T3 or T5 *Canadian yes no not applicable
- Foreign Bank Statements (only if it exceeded \$10,000 US) yes no not applicable
- Foreign accounts I need account number & average balance for year
- Cryptocurrency Bought Held Sold None

Other Income

- 1099-NEC (endorsement, self-employment) yes no not applicable
- 1099-MISC (Rental, Royalty, Other Income) yes no not applicable
- 1099-G (State tax refund) yes no not applicable
- 1099-G (Unemployment) yes no not applicable
- K-1 (Partnership earnings) yes no not applicable

Higher Education

- 1098-E (Student loan interest) yes no not applicable
- 1098-T (Tuition) yes no not applicable

Mortgage Interest & Taxes

- 1098 (Mortgage statement) yes no not applicable
- Property tax receipt yes no not applicable

Business or Employee Expenses

- Receipts yes no not applicable

Health Coverage

- 1095-A yes no not applicable

Charitable Contributions

- Receipts yes no not applicable