2022 TAX CHECKLIST

Client Task-List

1. You should have received access to a secure shared Google Drive folder. Please use this secure folder to upload all your tax documents and view all your tax return copies. Notify us if you have not received access yet.
2. *Emailing documents* – If you prefer to email documents, please CC Greg.K@gttaxcpa.com. I do have a high volume of incoming emails during tax season so a response may be delayed.
3. Provide the following request items: (*Existing clients* – please disregard all records you've already provided from previous years)

Business Entities (S-Corp/C-Corp/LLC/LLP/LPs)

- Copy of last three years of tax return(s)
- Complete the Tax Organizer (**download here**) – You may skip all questions/items that don't apply.
- 2022 Financials (or share email access to your accounting system, [QuickBooks, Xero, Wave, etc) .
  - Profit Loss Statement
  - Balance Sheet
- Payroll records (940/941s/W2s) or access to your payroll system.
- Copy of 1099s issued
- Articles of Incorporation/Organization
- Bank Account info –(If you'd like us to schedule tax payment on your behalf)
  - Account & routing # or voided check copy

Individuals

- Copy of last three years of tax return(s)
- Complete the Individual Tax Organizer (**download here**)– You may skip all questions/items that don't apply. Focus on page 1-2.
- Tax Documents received in 2022 [W2s, 1099s, K-1s, 1095 etc]
- Bank Account info - (If you'd like us to schedule tax payment on your behalf)
  - Account & routing # or voided check copy
- Copy of Driver's license/ID