



ACCOUNTING SOLUTIONS, LLC

## TAX PREPARATION SERVICES

**STEPHEN P. ARKULARY**  
ENROLLED AGENT

25 Years of Owning and Operating Real Businesses  
Over 13 years Tax Preparation Services

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### **Tax Appointment Checklist**

**Bring the original copies to our meeting, or with your mailed or emailed copies.**

- **Personal information -**
  - Last years income tax return copy if you are a new client
  - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents
  - Dependent Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit or Electronic Debit Required
  
- **Income Data Required -**
  - Wages and/or Unemployment
  - Interest and/or Dividend Income
  - State/Local income tax refunded
  - Social Assistance Income
  - Investment Income Pension/Annuity/Stock or Bond Sales
  - Self Employed Contract/Partnership/Trust/Estate Income  
Documentation of Income, Expenses, Required for Tax Credits and Business Expense and Loss Limitations
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income
  - Rental Income
  - Self Employment/Tips
  - Foreign Income

- **Expense Data Required -**
  - Dependent Care Costs (Names, EIN, Address, Phone Number included)
  - Education/Tuition Costs/Materials Purchased
  - Medical/Dental
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Employment Related Expenses if self employed
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Amount Due Paid with Previous Year(s) Tax Return
  - Real Estate Taxes and Home Property Taxes
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Vehicle Registration Expenses
  - Charitable Contributions Cash/Non-Cash
  - Purchase qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions
  - Home Purchase/Moving Expenses

**Minnesota Residential Homeowners**

During March of 2021, Residential Homeowners (including Mobile Homes) will receive their County Property Taxes Payable in 2021. In order to file the Form MN1 PR, the figures from the 2021 statement are required. Send me your 2021 Property Tax Statement copy by mail or email me a .pdf attachment to file the MN1 PRf or your rebate that should be deposited into your bank account in August or September of 2021.