D & D Tax Service Checklist

Name_____ **Date** _____

If you were referred by someone give the coupon to the receptionist along with this checklist.

	Yes	No	
Do you have your Drivers License or TX ID? (If filing a joint return both parties must have a valid ID)	☐	☐	Copy made ☐
Do you have your social security card? (If filing a joint return both parties must have their social security card)	☐	☐	Copy made ☐
Do you have the social security cards for all dependents you will be filing?	☐	☐	Copy made ☐
Are you filing from your last check stub?	☐	☐	

Circle all the forms you have with you:

(W-2) (1099-INT) (1099-OID) (1099-DIV) (1099-B) (1099-G) (1099-R) (1099-MISC) (1099-S) (W-2G) (K-1)(K-1) (1098)

Did you own your own business? Note: As long as you have a profit motive and make ongoing efforts to further the interests of your business, you can have a business even if you are not making money.	☐	☐	
Did you own rental property?	☐	☐	
Do you have retirement income or social security?	☐	☐	
Do you have mutual funds or stocks?	☐	☐	
Do you have a partnership, corporation, or trust?	☐	☐	
Do you own your own home?	☐	☐	
Did you pay any student loan interest in 2006?	☐	☐	
Did you have education expenses for anyone on your return?	☐	☐	
Do you have any delinquent such as back taxes, alimony, child support, student loans or prior refund anticipation loans?	☐	☐	

How would you like to file your return? (If you are not sure leave blank and we will cover this with you)	Electronic filing ☐	Direct Deposit ☐	(RAL) Refund Anticipation Loan ☐	Paper Return ☐