

M AND L ACCOUNTING TAX SERVICES INC
 CLIENT CHECKLIST 2015

FORM	DOCUMENTS	YES	NO	PENDING
W-2	WAGES & SALARY	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
W2G	GAMBLING/LOTTERY WINNINGS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1095-A	STATE EXCHANGE HEALTH INSURANCE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1095-B	PRIVATE HEALTH INSURANCE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1095-C	EMPLOYER HEALTH INSURANCE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-MISC	SELF-EMPLOYMENT INCOME	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-G	UNEMPLOYMENT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-G	REFUND STATE/LOCAL INCOME TAX	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-R	RETIREMENT/PENSION	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSA-1099	SOCIAL SECURITY INCOME	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-INT	INTEREST INCOME	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-DIV	DIVIDENDS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OTHER INCOME: PLEASE SPECIFY

1098	MORTGAGE STATEMENT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-A	SELL/BUY FORECLOSURE HOME	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1099-C	CANCELLATION OF DEBT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5498-SA/1099-SA	HEALTH SAVINGS ACCOUNT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1098-T	TUITION STATEMENT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1098-E	PAYMENT OF STUDENT LOAN	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PAYSTUBS	YEARLONG INCOME/DEDUCTIONS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LES(MILITARY)	LEAVE AND EARNINGS STATEMENT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PROPERTY TAXES	COUNTY FORM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NEW CLIENTS: PLEASE PROVIDE

PICTURE ID	TAX PAYER & SPOUSE	<input type="radio"/>	<input type="radio"/>
SSN/ITINS CARD	EVERYONE INCLUDING DEPENDENTS	<input type="radio"/>	<input type="radio"/>

Signature

Date

Signature

Date

I CERTIFY THAT ALL INFORMATION SUBMITTED TO M&L ACCOUNTING TAX SERVICES INC IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.