BP Administrations

11902 Rosecrans Ave Suite B **Norwalk, CA. 90650** Tel (562) 381-2408 **Fax (562) 991-5401**

Tax Appointment Checklist

Section A: General Income

Please check all that apply:

Form type		Number of forms
W-2	☐	_____
1099- MISC	☐	_____
1099- G	☐	_____
1099- R	☐	_____
1099-INT	☐	_____

***For forms 1099-MISC only:** If you had any expenses, please refer to Schedule C on our website.

Property Forms:

1098	☐	_____
1099-S	☐	_____

Other forms:

1099-C	☐	_____
1099-A	☐	_____
W-2G	☐	_____

Section B: Medical Insurance

Please check all that apply:

Medicare/ Medical ☐ Employer Provided ☐ Purchased my own ☐ Covered CA ☐

If you did not have medical coverage, when was the last day without medical coverage? _____

Did you receive form 1095-A or B or C? Yes ☐ No ☐ If yes, please provide a copy

Section C: Retirement Plan

Are you a participant in your employer's retirement plan? Yes ☐ No ☐

If not, did you fund a Traditional IRA or Roth IRA? Yes ☐ No ☐

Section D: Itemized Deductions

Please check all that apply:

Did you have any medical and dental expenses? Yes ☐ No ☐

Do you have mortgage interest (form 1098)? Yes ☐ No ☐

Did you make any charitable contributions? Yes ☐ No ☐

If you answered yes to any of the questions above, please refer to Schedule A on our website.

Section E: Additional Information

Did you have any solar panel installed? Yes ☐ No ☐

Do you own a fuel-efficient vehicle? Yes ☐ No ☐

Are you a homeowner? Yes ☐ No ☐ Number of properties _____

Do you own rental property? Yes ☐ No ☐ Number of properties_____

Do you receive Social Security benefit? Yes ☐ No ☐

If yes, do you have form 1099-SSA? Yes ☐ No ☐

Do you have a disabled family member? Yes ☐ No ☐ If yes, please answer the question below:

Who is the disable family member? _____

What kind of disability? _____

Do you receive compensation for caring for the above family member? Yes ☐ No ☐

Section F: Business Owners

Name of business: _____

Type of business entity:

Sole Proprietorship ☐ General Partnership ☐ Limited Liability Partnership (LLP) ☐

S-Corporation ☐ C-Corporation ☐ Limited Liability Company (LLC) ☐

***If acting as sole proprietorship, please refer to Schedule C on our website**