DOTY PRUETT WILSON PC
CERTIFIED PUBLIC ACCOUNTANTS

2 Centerpointe Drive, Suite 345 Lake Oswego, OR 97035
447 State Street Salem, OR 97301
503-362-9152 FAX 503-362-9168 info@dpwcpas.com

Client Checklist – Individual

Please mark if applicable & attached

- ☐ Prior Year Tax Returns: Past 2-3 Years
- ☐ Prior CPA authorization letter
- ☐ Basis Info

Income Documents/Forms

- ☐ W-2's
- ☐ 1099-G
- ☐ 1099-INT
- ☐ 1099-DIV
- ☐ 1099-R
- ☐ SSA-1099
- ☐ Unemployment
- ☐ Other: ________________________

Deductions & Credits

- ☐ Educator Expenses
- ☐ Student Loan Interest
- ☐ Tuition
- ☐ Medical Expenses: Divided by Individual
- ☐ Property Taxes
- ☐ Form 1098: Mortgage Interest
- ☐ Charity/Donations
- ☐ Mileage for Medical or Charity
- ☐ Union Dues
- ☐ Prior Year Tax Preparation Fees
- ☐ Child Care Expenses

Other Documents & Forms

- ☐ Health Insurance Coverage: ACA Compliance
- ☐ Estimated Tax Payments: Federal & State
- ☐ Extension Payments: Federal & State
- ☐ Direct Deposit Information: Voided Check

Notes/Comments

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Due Date for Info Returned to DPW: __________________________