**Tax Return Checklist**

**Taxpayer Last Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Last 4 SSN\_\_\_\_\_\_\_\_\_**

* Client Data Sheet complete and matches return
* Filing Status Flow Chart signed with applicable filing status selected
* Verified data entry accuracy of W2s

--# of W2s reviewed\_\_\_\_

* Verified data entry accuracy of 1099s

--# of 1099s reviewed\_\_\_\_\_

--Type (circle all that apply) MISC INT R SSA DIV C NEC

* All documents listed on Form 8867 are present

--Dependent documentation

--Head of Household documents

--Sch. C self-employment documents

* Due diligence interviews have been documented, if applicable

--Dependents

--Head of Household

--Sch. C self-employment

* Sch. C self-employment on return:

--Business existence documents on file

--Income documentation and matches return

--Expense documents or reconstruction on file and match return

* Sch. A on return:

--Documents on file for all deductions

--If no documents, reasonable explanation for all deductions

--Some documents, some explanation

* Education Credits

--# of 1098-T’s reviewed\_\_\_ --Support for qualified expenses\_\_