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UBU TAX PROFESSIONALS ELITE TAX CENTER

CHECKLIST FOR PREPARERS – OUTSTANDING ITEMS 2023 Tax Year

TAXPAYER _____ SS #: _____

PHONE NUMBER: _____ EMAIL: _____ DATED: _____

DATE	DESCRIPTION OF DUE DILIGENCE DOCUMENT	REC'D	MISSING
	2023 UBUTPE Taxpayer Engagement Letter (Signed)		
	2023 UBUTPE Main Client Information Sheet (Signed)		
	2023 UBUTPE Taxpayer Questionnaire		
	2023 Non-W2 or 1099 Wage Earners Income Statement		
	2023 Last Paycheck Stub		
	2023 W2s for Employees		
	2023 1099 Form for Self-Employed Individual		
	2023 1098 Form for Taxpayer who attended school		
	2023 Social Security Cards for Taxpayer		
	2023 Social Security Cards for Taxpayer Dependents		
	Copy of Driver's License or Other State ID		
	2023 Homeowner's Interest Statement (If Applicable)		
	2023 Homeowner's Annual Taxes		
	2023 Homeowner's Insurance Annual Amount		
	2023 401K Statement (If Applicable)		
	2023 Bank Information for Direct Deposit		
	2023 Invoices for Sole Proprietors Requiring Schedule C		
	2023 Receipts for Sole Proprietors Requiring Schedule C		
	2023 Bank Statements – Personal, Business and Credit Card Statements		
	2023 Form 6419 Reporting Child Tax Credit		
	2023 Form 6575 To Determines Recovery of 3 rd Stimulus Check		
	Any Other Documents Related to Preparation of Prior Year 2021 Tax Return		
	Prior Year Tax Return and/or Documents		

INSTRUCTIONS FOR TRANSMISSION

EFax to Tax Preparer at (803) 693-0303 or Email to ubutaxes2@ubutaxpros.com

(Place your First and Last name in the subject line of e-mails (Example: John Doe - 2023 Tax Documents))