

1-2-3 Checklist



Your name(s) _____

- Yes No Did you make any out of state purchases on which you did not pay sales tax?
- Yes No Were adjustments made **by the IRS or any state** to any prior 3 years' income tax returns?
- Yes No Will your income change significantly in 2012? Up Down
- Yes No Will your marital status change in 2012?
- Yes No Are you claimed as a dependent by your parents or anyone else?
- Yes No Did you have any new dependents in 2011?
- Yes No Are any of the dependents listed on last year's return no longer your dependents?
- Yes No Did you pay more than half the cost of supporting a parent?
- Yes No Did you receive a distribution from a qualified employer plan, Keogh or IRA?
- Yes No If yes, did you rollover the distribution to an IRA? within 60 days?
- Yes No If eligible, would you like to make a contribution to an IRA, Roth IRA or a SEP IRA?
- Yes No Did you convert a traditional IRA to a Roth IRA in 2011?
- Yes No Did you buy/sell any stocks / bonds / mutual funds (not IRA, 401(k), etc.) in 2011?
- Yes No Did you buy/sell your home? If so, provide us with closing statements for purchase and sale.
- Yes No Did you refinance your mortgage or take an equity loan on your 1st or 2nd home?
- Yes No Did you borrow money to make an investment?
- Yes No Did you make any loans that became uncollectible last year?
- Yes No Did you give any gifts of over \$13,000 to any one individual?
- Yes No Did you form a corporation, LLC, LLP or partnership?
- Yes No Did you have any income from foreign sources, not reported on 1099s? Were any foreign taxes withheld?
- Yes No Did you have foreign bank account or security acct? If yes, which country:
- Yes No Did you have foreign bank or security accts. with over **\$10,000** in total at any time during the year?
- Yes No Did you have foreign bank or security accts. with over **\$50,000** in total at any time during the year?
- Yes No Did you receive a distribution from, or were you the grantor of, or transferor to a foreign trust?
- Yes No Check yes to allow Juda Kallus to set your e-filing pin to **11111** and if married **22222** for your spouse.
- Yes No Check yes to allow Juda Kallus to discuss this return with the IRS / state if necessary?

Your Tax Return will be automatically uploaded for free to your personal Cyber Cabinet.

In addition you may request a copy via email, CD or paper.

Email pdf (password protected) \$10

CD (password protected) \$15

I will pick it up

Please mail it to me

Paper Tax Return \$25

I will pick it up

Please mail it to me

Recordkeeping

According to the IRS, you are required to keep records that will enable you to prepare a complete and accurate tax return. Although the law does not require any special form of records, **you must retain all receipts, cancelled checks, bank statements and other evidence** to support amounts claimed as deductions. You must keep your records for as long as their contents may be material in administering any Internal Revenue Law. In most instances, this means 3 years after the date of filing the return.