

## PEACE OF MIND RESULTS CHECKLIST

**It's time for another fantastic tax year with Peace of Mind Results Tax Services.**

Greetings,

**If you are a new client, please include the following information.**

**All names on tax forms including dependents.**

Full name:

DOB:

Social Security number:

- Filing status                       Singled                       Married filing joint  
 Married filing single               Head of household  
 Qualifying widow.

- Copy of a valid driver's license  
 Taxpayer and spouses W-2/w-2G  
 Previous year's tax returns

**View the client checklist below please, include all relevant forms in your tax documents.**

- 1098T  
 1099 Q  
 1098E  
 1098 mortgage statement  
 1099 INT  
 1099R  
 1099 DIV  
 1099 NEC  
 1099 MISC  
 1099K  
 1099 SA  
 SSA 1099  
 1095 A  
 Self-employed Business owners  
 Rentals/Royalties  
 Please include all business income, gross receipts, and cost of goods sold in the email or onboard app.

- Please, let us know of any changes that may affect this year's tax return.**  
 **Change of income, childbirth, retirement, opening/closing of your business, etc.**

**SCHEDULE HERE**



**PLEASE, DO NOT HANDWRITE YOUR BUSINESS INCOME OR EXPENSES**

**All EXPENSE**

- Advertising
- Vehicle expenses
- Commissions Paid
- Independent contractors,
- Contract Labor
- Supplies
- Insurance for business, self-employed, insurance, mortgage insurance, legal fees, office fees,
- Home office measurements
- Office Supplies
- Vehicles, machinery, equipment, other business property, supplies, repairs, and maintenance pensions, rents, or leases vehicle Utilities other expenses
- Travel
- Meals
- Other expenses

**If you have any questions or concerns, please email us.  
Thank you in advance,**

**J.H@PEACEOFMINDRESULTS.COM**

**JACQUELINE HAMILTON**  
**PEACE OF MIND RESULTS LLC**  
**FOR ALL YOUR TAX FILING AND  
TAX PLANNING NEEDS  
OPEN ALL YEAR AROUND**

**TIME TO REPLACE  
YOUR TAX  
STRESS WITH  
SUCCESS!**

QR code linking to the service.

A woman with long hair, wearing a striped shirt, is smiling and talking on a mobile phone.