

4U Tax-Pros Services Price List

Helping You Simplify Finances, Stay Compliant, and Save Big
Support@4UTaxPro.com | 601.564.8301 | www.4UTaxPro.com



4U Tax-Pros – New Client Welcome Checklist

Bring or upload the following documents so we can get started on your taxes

1. Personal Information

- ☐ Government-issued photo ID (Driver's license, State ID, Passport)
 - ☐ Social Security cards for you, spouse, and all dependents
 - ☐ Birthdates for you, spouse, and dependents
 - ☐ Bank account and routing numbers for direct deposit or payment
-

2. Income Documents

- ☐ W-2 forms from all employers
 - ☐ 1099 forms (NEC, MISC, INT, DIV, G, R, etc.)
 - ☐ K-1 forms from partnerships, S-corps, or trusts
 - ☐ Self-employment income & expense records
 - ☐ Rental property income & expense records
 - ☐ Unemployment income (1099-G)
 - ☐ Retirement income (1099-R, SSA-1099)
-

3. Deduction & Credit Records

- ☐ Mortgage interest (Form 1098) and property tax statements
 - ☐ Charitable donation receipts
 - ☐ Medical and dental expense records
 - ☐ Child care provider info (name, address, EIN/SSN, amount paid)
 - ☐ Education expenses (Form 1098-T, book/supply receipts)
 - ☐ Energy-efficient home improvement receipts
-

4. Business & Self-Employment (if applicable)

- ☐ Business income and expense records
- ☐ Business mileage log
- ☐ 1099-K or payment processor statements (PayPal, Stripe, etc.)

4U Tax-Pros Services Price List

Helping You Simplify Finances, Stay Compliant, and Save Big
Support@4UTaxPro.com | 601.564.8301 | www.4UTaxPro.com

- ☐ Home office expense details
-

5. Other Important Items

- ☐ Last year's tax return
 - ☐ Any IRS or state tax notices
 - ☐ Estimated tax payment records (dates & amounts)
-

 **Tip:** If you're unsure about a document, bring it anyway — we'll determine if it's needed. You can also securely upload documents through our online portal.