

Phone: (254) 628-2001
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1705 S Fort Hood Street, Ste 101, Killeen, TX 76542

ALL IN ONE TAX SERVICES

Appointment Date: _____
Time: _____

Katie Grant

It's tax time again!

As always, the information you provide is completely confidential, and is never shared with others. Please look over the following items needed to process your return.

Please provide a copy of your 2019 Tax Return, if we *didn't* prepare your return last year.

Company Name: _____ EIN: _____ Date of Incorporation: _____

Officer (or Partner) 1 Name: _____ SSN: _____ DOB: _____

Officer (or Partner) 2 Name: _____ SSN: _____ DOB: _____

Officer (or Partner) 3 Name: _____ SSN: _____ DOB: _____

Officer (or Partner) 4 Name: _____ SSN: _____ DOB: _____

Company address: _____ City: _____ State: _____ Zip: _____

Mailing Address (if different): _____ City: _____ State: _____ Zip: _____

Office Phone: _____ Fax: _____ Alternate Phone: _____

Change in business location 2020? If so, please check box and provide old address

Previous address: _____ City: _____ State: _____ Zip: _____

PRIMARY BIZ ACTIVITY: _____

PRINCIPAL PRODUCT OR SERVICE: _____

1040ES (Estimate Tax Paid) 4/20 \$ _____ ; 6/20 \$ _____ ; 9/20 \$ _____ ; 1/16/21 \$ _____

Income Items to have ready: Profit Loss Statement, Balance/Income Sheet, Interest earned, Dividends, Rental Info., Sale of Biz Property, Misc Income info (1099-MISC).

INTEREST EARNED: Savings, CDs, Property contracts, Bond Interest, etc.

Payer Name (Bank, Credit Union, Other)	Amount	Payer Name	Amount

FOR ALL PRIMARY SOURCES OF INCOME/EXPENSES

Please attach a copy of your Profit and Loss Report for the tax year, along with a Balance sheet (if applicable), or other proof of income and expense from all sources separated by type. We don't need to see physical receipts as long as they are accounted for on some type of excel sheet (if not Profit Loss Statement). **WAIVER:** You need to have the receipts in your files. If you account for receipts that you do not have in your possession, AIO is not responsible for any repercussions associated with any resulting audit exclusions.

Please feel free to call us with any questions!