PROVEN STRATEGIES

Supporting Documentation for Tax Preparation

All Return Types:

Tax Organizers:

- Our digital tax organizers simplify the document gathering process and allow for document upload during completion: **https://portal.andersonadvisors.com/taxorganizer**
- For a PDF version of a digital tax organizer, please visit **https://andersonadvisors.com/client-forms/**

Prior Year Documentation:

- A copy of your Personal and Business income tax return from last year

This document provides a comprehensive list of supporting documents that may be required for the preparation of your personal and business entity tax returns. Additional documentation may be requested based on your individual circumstances.

Business Entity Tax Returns (Form 1120, 1120S, and 1065):

Financial Statements:

- Balance sheets, income statements, etc.

Investment Documentation:

- Brokerage statements detailing investment transactions (stocks, bonds, options, etc.).

Financial Account Documentation:

- Fiscal year-end bank account and credit card statements.

Real Estate Documentation:

- Copies of closing statements regarding the sale or purchase of real property.

Tax Authority Correspondence:

- Any tax notices sent to you by the IRS or other taxing authority.

Please ensure all documents are legible and complete. If you have any questions regarding the required documentation, please contact us at **mytaxteam@andersonadvisors.com** or at **702-628-5236.**

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