



CLIENT BOOKKEEPING PREP STEPS

Purchase a file folder. Check the boxes below when you have placed the requested documents in the file. Call Linda Hopkins at TaxHelpReturns to bring in the materials. Please make copies for us, not originals.

- 1) Bank statements for the last 12 months:

- 2) Check Register for the last 12 months:

- 3) Inventory schedule (if any) for the last year:

- 4) Credit Card Statements for last 12 months:

- 5) Cash Expense Register:

- 6) Depreciation Schedule (if any):

- 7) Prior 3 years Tax Returns:

Call Linda Hopkins at (720) 313-9593 for an appointment!!