



## **Services Provided by Legacy Tax & Accounting, Solutions, LLC**

### **Comprehensive Tax Preparation Services**

**We provide accurate, efficient, and compliant preparation of all IRS tax forms for individuals, families, and businesses.**

**Our services include:**

- Federal and state income tax returns**
- Small business and self-employment filings**
- Corporate, partnership, and LLC returns**
- Amended tax returns**
- Prior-year and catch-up filings**
- Tax planning and strategy for year-round support**

**To ensure accuracy and maximize your refund or reduce liability, we offer detailed interview and consultation services, walking you through every step of the tax preparation process.**

# Estate & Trust Returns

- **Form 1041 – U.S. Income Tax Return for Estates & Trusts**
- **Form 706 – Estate Tax Return**
- **Form 709 – Gift Tax Return**

## **COMMON 1040 SCHEDULES**

**These attach to Form 1040:**

- **Schedule 1 – Additional Income & Adjustments**
- **Schedule 2 – Additional Taxes**
- **Schedule 3 – Additional Credits**
- **Schedule A – Itemized Deductions**
- **Schedule B – Interest & Dividends**
- **Schedule C – Profit or Loss From Business (Self-Employed)**
- **Schedule D – Capital Gains and Losses**
- **Schedule E – Supplemental Income (Rentals, Royalties, K-1s)**
- **Schedule F – Farming Income**
- **Schedule H – Household Employment**
- **Schedule SE – Self-Employment Tax**

# **Investment & Property**

- **Form 4797 – Sale of Business Property**
- **Form 6251 – Alternative Minimum Tax**
- **Form 8949 – Capital Asset Transactions**
- **Form 8824 – Like-Kind Exchanges**
- **Form 8960 – Net Investment Income Tax**

## **Self-Employed & Business**

- **Form 4562 – Depreciation**
- **Form 8829 – Business Use of Home**
- **Form 1096 – Transmittal (for paper 1099s)**
- **Form 941 – Employer’s Quarterly Tax Return**
- **Form 940 – Employer’s Annual Federal Unemployment Return**
- **Form W-9 – Request for Taxpayer ID**
- **Form W-4 – Employee Withholding Certificate**

## **NONPROFIT & EXEMPT ORGANIZATION FORMS**

- **1023 – Application for 501(c)(3) Status**
- **1023-EZ – Streamlined Exempt Application**
- **1024 – Application for Other Exempt Orgs**
- **Form 990 Series (listed earlier)**

## **COMMON SUPPORTING FORMS**

### **Income Reporting**

- **W-2 – Wage Statement**
- **W-2G – Gambling Income**
- **1099-NEC – Nonemployee Compensation**
- **1099-MISC – Miscellaneous Income**
- **1099-INT – Interest Income**
- **1099-DIV – Dividends**
- **1099-B – Brokerage Sales**
- **1099-R – Retirement Distributions**
- **1099-G – Unemployment, State Refund**
- **SSA-1099 – Social Security Benefits**



## **Nonprofit Organization Support & Financial Literacy Education**

**Legacy is committed to empowering our community through financial knowledge. We provide:**

- Assistance with nonprofit formation and IRS filings**
- Ongoing bookkeeping and compliance support**
- Workshops and outreach programs focused on financial literacy, budgeting, credit, and long-term planning**
- Educational resources to build stronger financial futures for individuals and families**





## **IRS Representation & Tax Audit Support**

**As your dedicated advocate, we stand by you in every tax matter.**

**Our services include:**

- **IRS audit representation**
- **Responding to IRS notices**
- **Professional review of IRS findings**
- **Acting as your client fighter to protect your rights and secure fair outcomes**



## **Notary Services**

**Convenient, reliable Notary Public services for:**

- **Financial documents**
- **Legal forms**
- **Real estate paperwork**
- **Affidavits and sworn statements**
- **Business contracts**



## **Financial Advisory & Guidance**

**We provide personalized advisory services to help you plan for a strong financial future:**

- Budgeting and money management**
- Tax planning and projection**
- Small business financial coaching**
- Credit improvement guidance**
- Long-term financial strategy**

