



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**