

What to bring to have your tax return prepared:

All pertinent healthcare Proof of Insurance forms (1095A, 1095B, or 1095C)

Children's Social Security # and date of birth including any children born during this tax year

All W-2 forms and 1099's received from employers

All forms received for unemployment received

All forms for Social Security Benefits received

All 1099-R forms received on pensions, retirement account withdraws, etc

All 1099's received for interest or dividends

Any K-1 (Partnership income) statements you have received

All investments sold within tax year – need original purchase date(s) and cost at purchase date

All property sold within tax year (including rentals and investment property) – need original date of purchase and cost at purchase date – always helps to bring any closing statements

For rental property:

Rent received and All expenses for rental property

For royalties:

Statements received for royalties

For farm schedules:

Farm income and all expenses for farm

Student Information:

Student loan interest statements

1098T forms/Statements for qualified college tuition and fees (from the college or university)

Dependent Care Expenses (when both spouses work):

Name of provider and provider's tax ID #

Amount paid to provider

For Itemized Deductions:

Medical (Totals only please)

Prescriptions

Doctors, dentists, and nurses vehicles

Hospitals and nursing homes

Insurance premiums (this is medical only—life insurance is not deductible)

Lodging & transportation

Out of pocket expenses

Medical miles

Taxes:

Property taxes for all property owned, sales tax for **new not used** vehicles, vehicle registration fees

Investment property taxes

State and local income taxes paid in tax year (even if paying with prior year return)

Interest:

Interest paid on home

Points paid at closing (if you have purchased and/or sold a home or refinanced your existing home) bring your two column settlement statement.

Donations:

Totals for all cash donations—you do not need receipts to show us (keep receipts for IRS if audited)

Totals by recipient (ie. Goodwill, Salvation Army, etc.) for all non-cash donations. Receipts received from non-profit organizations will have address, etc that we need for your return.

Unreimbursed EMPLOYEE expenses:

Job travel (mileage and hotel), Union dues, job education, etc.

NOTE: You may NOT take a clothing/uniform deduction unless you CANNOT wear the clothes as street clothes. Business suits required as a “dress code” CAN be worn outside of work. This deduction is very difficult to qualify for.

Charge for safe deposit box rental (if you have one)

Gambling losses (up to the amount of gambling winnings)

For self-employed individuals:

Business Expenses:

Accounting

Advertising

Answering Service

Bad debts from sales or service

Bank charges

Car & truck expenses – mileage log totals —mileage beginning and end of year, #miles driven for business

Commissions

Delivery & freight

Dues & subscriptions

Employee benefit programs

Insurance (other than health)

Interest

 Mortgage

 Other

Janitorial

Laundry and cleaning

Legal and professional

Miscellaneous

Office Expense

Outside Services

Parking and tolls

Pension and profit sharing plans (for employees)

Postage

Printing

Rent or Leasing

 Vehicles, machinery, equipment

 Other

Repairs

Security

Supplies

Taxes and Licenses

 Real estate taxes

 Payroll taxes

 Sales tax included in gross receipts

 Other

Telephone (including cell phones)

Tools

Travel, meals, entertainment costs

Uniforms

Utilities

Wages (paid to employees)

 Total wages

Other expenses

Office in home expenses: (This must be a specifically designated room for office use for your business ONLY)

 Square footage of room and square footage of home

 Total amount paid for all utilities

 Mortgage Interest and Taxes on Home, Homeowners Insurance, Homeowners association dues,

 Security system charges for year, any repairs/improvements done on home, Rent paid (if you don't own your home)