

## **What to bring to have your tax return prepared:**

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 compensation

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 and dentists

Hospitals and nursing homes fees paid

Insurance premiums and long term care (this is medical only—life insurance is not deductible)

Lodging & transportation

Out of pocket expenses

Medical miles driven

Taxes:

Property taxes for all property owned, sales tax for **new** vehicles(cannot be used), 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.

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)