

TAX LADIES

INCOME TAX SERVICE

What to bring to your Tax Interview

Personal Data:

- Last year's tax return (Returning Client? We have last year's return)
- Social security cards
- Dates of birth for the family
- Child care provider name, address and tax ID number
- Proof of Medical form 1095-A, 1095-B or 1095-C
- Driver's License or State ID

Employment & Income Data:

- All income documents W-2's, 1099's, and W-2G's
- Unemployment Compensation form 1099-G
- Partnership, S-Corp and Trust income, Schedule K-1
- Pensions and Annuities form 1099-R
- Social Security Benefits
- Alimony Received
- Jury duty pay
- Gambling & Lottery Winnings form W-2G
- Prizes and Awards
- Scholarships & Fellowships
- State refunds form 1099-G
- Rental Income & Expenses
- Farm Income & Expenses
- Cancellation of Debt form 1099-C

Financial Assets:

- Interest income statements form 1099-Int & 1099 OID
- Dividend income statements form 1099-Div
- Proceeds from broker transactions form 1099-B

Adjustments:

- Health Savings Account
- Medical Savings Account
- IRA Contributions (Traditional & Roth)
- Self Employed Qualified Plans
- Alimony paid
- Student Loan Interest

Credits

- Education Expenses form 1098 -T if available
- Daycare Expenses
- Adoption Expenses

Homeowner Data:

- Mortgage Interest Statement form 1098
- Refinancing documents
- Real Estate taxes paid
- Buy or Sale of home or other real estate papers form 1099-S
- Moving Expenses

Itemized Deductions:

- Contributions (Church, College, United Way, March of Dimes)
 - Value of Furniture or Clothing given to....
 - Volunteer work expenses (Church, Scouts, miles driven)
- Unreimbursed expenses related to your job (union dues, travel, tools, uniforms)
- Investment expense
- Job related education expense
- Tax Return prep fee
- Gaming expenses to offset winnings
- Taxes (Real Estate, Personal Property, State Income Tax)
- Medical Expenses (Out of Pocket Expenses)
 - Operations, Prescription Drugs, Lab & X-Ray, Glasses & Contact Lenses,
 - Dental, Therapy Treatments, In-home care, Miles driven
- Interest Paid (Home Mortgage, 2nd Mortgage, Points Paid at Closing)
- Safety Deposit Box

Self - Employment business expense:

- Business Income form 1099-Misc and or personal records
- Business related expenses or other documents
- Business vehicle expenses records
- Self Employed Health Insurance
- Business use of the home