

Tax Deduction Information and Forms Checklist

This form Covers Most Jobs When a W2 is Issued

Revised April 20, 2019

This form has changed – READ CAREFULLY

The new tax law taking effect for 2018-2025 tax years has eliminated several deductions that we have used in the past. This is a revised list of items that you need when you come to see us for your tax return. We have additional forms on our [downloads](#) page to help in your record keeping. (Please note: this list is not complete, it is a short summary and more information may be needed on certain items.)

>>This list must be filled in with your totals for a discount to apply.<<

PLEASE DO NOT BRING CHILDREN WITH YOU TO PREPARE YOUR TAXES.

Be prepared – Appointments are not made after April 10 – only extensions.

**What to bring: Please have everything together before you come for your appointment.
Please fill in your totals in the square next to each question.**

Please read this form carefully and completely. If this form is not filled in, you may have to pay more or re-schedule your appointment. There is no guarantee that I will re-schedule or if I have a time slot available. Or, you can choose to use the standard deduction and possibly a smaller refund.

- W2s from all jobs worked during the year
- 1099s from any self-employed work done
- Accurate list of income from a sideline business
- 1099-Rs from retirement income and investments
- Social Security income form if on social security
- 1099-G if you have any gambling winnings or unemployment income
- 1098-T if you have tuition fees for you, your spouse, or a dependent
- Interest income statements from banks, savings, etc.
- Mortgage Interest form from mortgage company
- Property tax statement from county tax assessor
- HSA documents
- Any other forms that indicate that a copy was mailed to the IRS
- Last pay check stub issued in December (For each taxpayer)
- Copies of social security cards for each dependent if I do not already have a copy
- We will need to make copies of your Driver's License or State issued ID card
- Last year's tax return if we did not do the return

A receipt is a register tape, bank statement, credit card statement, etc.

Deductions: CHECK MARKS ARE NOT DEDUCTIBLE. PUT YOUR FIGURES IN THE PROPER PLACE.

Schedule A: These are your personal deductions

Medical and Dental Expenses (Expenses for yourself, spouse, children and other relatives (even if they don't live with you.) Combine all totals for one figure next to each question.

| | |
|--|---|
| | Prescriptions |
| | Health Insurance Premiums (Paid by you – will be on your check stub) |
| | Long Term Care insurance premiums |
| | Doctor's, dentist's, and practitioner fees (includes chiropractor) |
| | Hospitals, clinics, and medical facility fees |
| | Lab and X-ray fees |
| | Eyeglasses, contact lenses, contact care solution, etc. |
| | Medical equipment and supplies prescribed by the doctor |
| | Birth control (male and female) |
| | Mileage for all medical for the year (local and out of town) |
| | Lodging expenses up to \$50 per person per night for overnight travel |
| | Other medical and dental expenses or equipment |

Sales Tax

The tax program gives you an amount based on your income total. Additional sales tax for unordinary purchases – such as, Furniture, Appliances, Vehicles, Etc.

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|--|-----------------------|
| | Furniture |
| | Appliances |
| | Vehicles |
| | Other sales tax items |

Real Estate Taxes – bring your property tax statements

| | |
|--|--|
| | Your main residence |
| | Additional property, land or time shares |

Mortgage Interest – bring your mortgage interest statements

| | |
|--|--|
| | 1 st Mortgage |
| | 2 nd Mortgage |
| | Additional Mortgage Information |
| | Mortgage Insurance Premiums |
| | Closing costs on new home purchase – bring the closing papers |

Gifts to Charities – cash donations – amount on left – name of charity on right

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**Very important – donate to Goodwill, American Council of the Blind, Catholic Family Charities, Savers, etc. (Clothing, furniture, toys, etc.) AND GET RECEIPTS \$\$\$\$
BRING YOUR RECEIPTS**

Child Care – You will need a receipt from the provider. The receipt must contain:

- Name of Organization / or Person doing the day care**
- Complete address**
- EIN or Social Security number for the individual provider**
- Phone number**

The maximum deductible expense is \$3000 per child

Gambling – Bring your W2G if you received one.

School Expenses

School loans – bring the forms – not a picture on your phone

1098 T and expenses - Must Have the 1098T in your hands.

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|--|---|
| | Bring the 1098T for you, your spouse or dependent children |
| | Expenses – supplies, books, backpacks, computers, software, equipment, lab fees |
| | Parking fees, room and board, |
| | Tutoring |
| | Uniforms |
| | Transportation fees |

This list will get you started – sometimes other factors may give you a tax deduction. The only dumb question is the one that you don't ask. So, ask that question – it MAY be deductible.

Questions you may have:

1. Do I need to make an appointment?
 - Yes
 2. May I bring my children with me?
 - No – distractions may cause a mistake on your tax return
 3. How much do you charge?
 - Prices are on the first page of the website.
 4. How long will my session last?
 - Depends on if you have this checklist completed and if you have all your forms. A normal session is one hour. Some may take 2 hours.
 5. Are you able to do all forms for my tax return?
 - In most cases, yes. I have not had any exceptions yet.
 6. How long will my refund take?
 - Normally a week to 10 days, but the IRS says 21 days if no problems with your tax refund.
 7. I don't have copies of social security cards for my children, what now?
 - I will need proof that the child is your child. A previous tax return with their name and social security number will work, otherwise you will need to get a letter from the social security office.
 8. Do you have my previous information from previous years?
 - Yes, but we need all information updated every year.
 9. I forgot a form on my tax return, what do I do?
 - You may need to do an amended return – price starts at \$200 – discounts do not apply to an amended return.
 10. What is my password for the tax return sent to me?
 - The taxpayer's full social security number – no dashes.
 11. What if I don't do the checklist and fill in my figures?
 - You can choose to pay regular price, use the standard deduction or take a chance on rescheduling. Of course, I most likely won't reschedule you.
- FOLLOW INSTRUCTIONS – FILL IN THIS FORM WITH YOUR FIGURES.**
12. You did not do my tax return last year. Will you do this year's tax return for me?
 - I am no longer taking new customers and if you skip a year you become a new customer. So, in other words – NO.