Tax Deduction Information and Forms Checklist

This form Covers Most Jobs When a W2 is Issued

Revised October 2026

This form has changed – READ CAREFULLY

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.

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.

Like in school – READ the instructions.
Each checklist item is self-explanatory.
Things have changed like going to Sam's Club. Read each line.

Deductions: <u>CHECK MARKS ARE NOT DEDUCTIBLE.</u> 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.)

<u>Combine all totals for one figure next to each question.</u>

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

You can put your total purchases down for each item or the sales tax (One or the other) Not mixed from both.

	Furniture
	Appliances
	Vehicles
	Other sales tax items

Real Estate Taxes – bring your property tax statements (Your personal properties only – NOT Rentals) Rental property tax goes on your rental property Schedule E.

	Your main residence
	Additional property, land or time shares

Mortgage Interest – bring your mortgage interest statements – DO NOT PUT YOUR RENTAL PROPERTY MORTGAGE INTEREST HERE.

	1st Mortgage
	2nd Mortgage
	Additional Mortgage Information
	Mortgage Insurance Premiums
	Closing costs on new home purchase – **bring the closing papers – not all closing costs are deductible.**

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

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 for one child or $6000 for 2 or more children

Gambling – Bring your W2G if you received one.

School Expenses – College Only

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

1098 T and expenses - Must Have the 1098T in your hands. The below is only for college.

	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

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.