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“Maximizing your refund **Above & Beyond** your expectations!”

Tax Information

Important Tax Documents

(Information necessary to file your income taxes)

(W-2) Income from Employers
 (W-2G) Gambling Winnings

(1098) Mortgage Interest Statement
 (1098-E) Student Loan Interest
 (1098-T) Tuition Statements

(1099-A) Acquisition or abandonment of secured property
 (1099-B) Stocks, Bonds, Bartering
 (1099-C) Canceled Debt
 (1099-DIV) Dividend Statement
 (1099-G) Unemployment Compensation/State Tax Refunds
 (1099-INT) Interest Statements
 (1099-LTC) Long Term Care Benefits
 (1099-Misc) Miscellaneous Income
 (1099-MSA) Medical Savings Accounts

(1099-R) Pension/IRA/401(k) Distributions
 (1099-S) Real Estate Sales

(K-1) Shareholder’s Share of Income from Partnerships, LLCs or S-Corporations

Alimony
 Childcare Fee Statements
 Donation Receipts & Statements

IRA Deposits & Withdrawals
 Rental Property Income
 Settlement Statements (Purchase or Sale of Property)
 Social Security Benefits Statement
 Veterans Benefits Statement

Any statement you received that says
“Important Tax Document”

Medical Expenses

Insurance (*Out-of-Pocket & Withheld from check*)
 Co-Payments
 Prescriptions/Birth
 Control/Insulin & supplies
 Glasses/Contacts & Solution
 Hearing Aids & Batteries
 Medical/Dental Exams
 Eye Exams
 Mental/Physical Therapy*
 X-Rays, Labs, Clinics*
 Braces/Dental Work
 Crutches/Wheelchairs
 Orthopedic Shoes
 Guide Dogs & their care

Laser Eye Surgery
 Ambulance Service
 Mileage to Medical Care
 Parking & Tolls
 Acupuncture/Chiropractor
 Artificial Limbs and Teeth
 Lodging while away from home for treatments
 Nursing Help
 Hospital Care (*Including Meals & Lodging*)
 Long Term Care Services
 Stop Smoking Programs & Prescriptions*

Weight Loss Programs for specific disease*
 Medical Center Treatment for Drug/Alcohol Addiction
 Special Schools for physically/mentally handicapped
 Transportation for physically/mentally handicapped
 Hand Controls for Car
 TTY Equipment/Installation
 Oxygen Tanks & Equipment

*(*Must be ordered or prescribed by Doctor)*

Donations

Cash/Check (ex: Church, Feed the Hungry, etc)
 Payroll Deduction (ex: United Way, Red Cross)
 Charitable Mileage
 Other Charitable Costs
 Appraisal fees to determine the value of Donations

Non-Cash Items (ex: Clothing, Furniture, and Food)
 Date of Donation
 Non-Profit Organization Name
 Address

Other Deductions

State Tax Payments <i>(Other than job)</i>	Professional Association Fees	Investment & Broker Fees
Estimated Taxes paid	Licenses/Permits	Internet Trading Fees
Real Estate Taxes	Uniforms/Protective Gear	Legal Fees/Advice
Car/Boat Tags	Boots	Safe Deposit Box
Motorcycle Tag	Uniform Maintenance <i>(Cleaning, Alterations)</i>	Professional Magazines
Educational Expenses	Tools required for job	Job Search
Roundtrip Mileage to Class	Continuing Education	Resumes/Printing
Books/Software	Income Tax Preparation	Mileage (for interviews)
Testing Fees	Name of Child Care Provider	Employment Agency Fees
Tuition	Address	Mailing Expenses
Mortgage Interest & Points	Tax Id or SS#	Faxing Charges
Union Dues	Childcare Fees Paid	Travel

Moving Expenses

*(*Must be More than 50 Miles in connection with Job)*

Date of Move	Mileage: old home to old job
Old Home City	Packing Materials
New Home City	Hotels
Truck Rental	Moving Company Fees
Amount Employer Reimbursed	Storage
Mileage: old home to new job	

Rental Property

Each property must be listed separately.

Date Purchased	Fence	Office Supplies/Books
Purchase Price	Filing Fees	Office Rent
Property Address	Fire Extinguishers	Painting
Date Sold	Floors	Pest Control
Selling Price	Furniture	Plants/Flowers
Date Rented	Item	Plumbing
Rent Received	Date of Purchase	Points
Advertising	Cost	Refinance Charges
Appliances	Homeowners Association Fees	Rent Received
Item	Installation Fees	Rent Collection Costs
Date of Purchase	Insurance	Repairs
Cost	Investment Counseling Costs	Roof
Appraisals	Lawn Maintenance	Sanitation
Assessment Fees	Leasehold Improvements	Salaries
Blinds/Curtain	Lease Preparation	Security System
Bookkeeping	Legal Fees	Smoke Alarms
Carpet	Maintenance	Stationery & Supplies
Cleaning Service	Major Improvements	Supplies
Cleaning Supplies	Management Fees	Taxes
Closing Costs	Mileage	Tax Counseling
Commissions	Misc. Items (Light Bulbs, Door	Tax Return Preparation
Contractor Fees	Knobs, Faucets, etc)	Traveling Expenses
Decorating Costs	Mortgage Interest	Utilities
Deposits	Moving Expenses for	Walls
Electrician	Equipment/Appliances	

Self-Employment/ Business Deductions

Income	Filing Fees	Sanitation
Accountant	Faxing Charges	Security System/Alarms
Advertising	Freight	Software
Business Cards	Furniture Purchased	Storage
Flyers/Posters	Item	Supplies
Stationery	Date Purchased	Taxes
TV/Radio	Cost	Federal
Telephone Directory	% of Business Use	State
Newspaper/Magazine	Furniture Rental/Lease	Employer
Billboards	Gifts to Customers	Payroll
Internet	Gifts to Employees	Business Property
Specialty Items (Pens, Cups, Magnets, etc)	Gifts to Other Businesses	Sales
Answering Service	Graphic Design	Tax Counseling
Auto Expenses:	Insurance	Tax Preparation
Business Miles	Liability	Telephone
Commuting Miles	Disability	Office
Personal Miles	Errors & Omissions	Cellular
Total Mileage for the year	Health	Travel
Monthly Payment	Life	Air Fare
Total Cost of Vehicle	Malpractice	Cab Fare
Make, Model & Year	Workers Compensation	Hotel
Date Business Use Began	Information Services	Tools
Parking/Tolls	Internet Service/DSL	Utilities
Gas/Oil	Interest on Business Loans	Electricity
Car Washes/Waxes	Inventory	Gas
Insurance	Janitorial Service	Sanitation
Garage Rent	Licenses/Permits	Water
Tires/Accessories	Legal Fees	Cable (Commercial Office Only)
Repairs	Magazine/Newsletter	Uniforms
Inspection/Registration	Subscriptions	Purchase
Taxes	Mailing Lists	Cleaning/Maintenance
Banking Fees	Marketing Promotions	Website/Web Hosting
Billing Service	Market Research	Wages
Bookkeeping	Meals & Entertainment	
Bonds (Surety, Fidelity, etc)	Mortgage Interest (Purchase of Business Building)	Home Office —Complete this Section only if your office is located in your home.
Catering	Music System (in Office)	(Use Monthly Figures)
Check Validation Service	Music (CDs/Tapes)	% of Home Used as Office
Commissions	Office Supplies (Ex: Paper, Pens, Ink, etc.)	Monthly Rent
Consultant Fees	Payroll Service	Mortgage Payment
Contractors	Pension Plans	Utilities
Courier Service	Profit Sharing	Electricity
Credit Card Terminal Rental	Employee Benefit Programs	Gas
Credit Card Service Fees	SEP	Water/Sewer
Delivery Charges	401(k)	Garbage
Decorating Expenses	Cafeteria Plan	Repairs to Home
Donations	Postage	Repairs to Office Space
Drinking Water	Post Office Box	Home Owners Insurance
Books	Professional Services	Security Alarm Service
Classes/Seminars	Prof. Association Dues	Decorating/Painting Art/Plants
Workshops/Conferences	Paper	Total Cost of Home
Equipment Purchases	Printing	Date Business Use Began
Item	Prizes	
Date Purchased	Referral Fees	
Cost	Rent (Office Space)	
Equipment Rental/Lease		