

SAL'S TAX PREPARERS INC

****Tax Information Needed To Bring To Appointment****

Personal & Dependent Information:

You don't need to have all of these things, but you'll need at least 3-4 items to show your child lives in your house. The school records are probably the easiest if your child is of school age.

- **New Clients:** Please bring Last year income tax Return
- Social Security or ITIN Numbers, Birth Certificates with date of births for anyone who'll be on your tax return.
- School records or statement
- Landlord or property management statement
- Health care provider statement
- Medical records
- Placement agency statement
- Social service records or statement
- Place of worship statement
- Indian tribal official statement
- Employer statement
- Amount of any alimony payments with ex-spouse SSN

If you are claiming a disabled child, you'll need to prove the disability:

- Doctor statement
- Other health care provider statement
- Social services agency or program statement

Child care statements:

- Childcare payment records with licensed provider's Name, Address and Federal ID number(s). If an individual (name, address, and social security number)

Income Documentation:

- Bring any & all W-2's, 1098, 1099, 1099 INT, 1099 DIV, SSA 1099, 1099G, 1099 S, 1099 MISC, Schedule K-1 forms, Alimony Inc., Foreign Inc.& Unemployment (1099) etc....
- Purchase date & total investment for any stocks or property sold
- List of investment related expenses
- Education scholarships or fellowships

Itemized Deductions

If you are planning on itemizing your deductions (Schedule A) please compose a spreadsheet/list summarizing them. Itemized deductions include:

- Mortgage interest 1099 interest statement, real estate & personal property tax records.
- Casualty & theft losses
- Amounts of state & local income tax paid in prior years
- Records of **cash** donations to religious institutions, schools & other charities
- Records on **non-cash** charitable donations
- Unreimbursed job related expenses (union dues, travel, tools, cell phone charges, uniform cost/cleaning, luggage, services fees, trade journals, meals & entertainment etc..). **** If you are claiming your vehicle as a business expense please get third party documentation for mileage(could be oil change receipts for tax year with mileage report) also create and maintain a log journal of mileage used for business purposes. ****
- Job search/moving expenses

Retirement & Education:

- Records of any contributions to IRAs, HSAs & other retirement plans
- Records of tuition and other higher education expenses (books, computers, etc) **1098 T** form is from education facilities. ****Please get college Account Transcript showing tuition Paid.****

Estimated Tax Payments

If you made any estimated tax payments this tax year, we will need to know the dates and amounts paid of all federal and state estimated tax payments.

Health Care:

- Form 1095-A if you received health insurance from an Exchange (State or Federal)

- Marketplace exemption certificate if you applied for and received an exemption from the Exchange

Stocks & Mutual Funds:

If you sold stocks or mutual funds, please provide a spreadsheet/list showing:

- The date(s) you purchased each item(s) sold
- Total purchase price of each item sold. Do not assume your cost information is provided on Form 1099.

Self-Employment:

Please prepare a simple 1 page income statement which summarizes your:

And if you're self-employed, you're going to need to prove you really have some sort of business with the following records:

- Business license
- 1099MISC forms
- Income summary
- Expense summary
- Bank statements
- Gross self employment income for the tax year and your applicable expenses categorized and summarized by the type of expense (i.e. advertising, equipment, supplies, rent paid, vehicle exp.etc)

*** If you are claiming your **vehicle as a business expense** please get third party documentation for mileage(could be oil change receipts for tax year with mileage report) also create and maintain a log journal of mileage used for business purposes. ***

Rental Property:

If you received income from rental property (Schedule E), please prepare a simple 1 page income statement showing:

- Gross rental income you received during the tax year
- Your applicable expenses categorized and summarized by the type of expense (i.e. advertising, mortgage interest, real estate taxes, repairs, maintenance, condo fees, etc).
- Capital improvements: Example (new roof, windows, boiler etc..)

- Rental start date and original cost base for all properties
- Original purchase price paid for the property and date of purchase.

Business Use of Home:

If you used a portion of your home for business use, please provide:

- Square footage calculation of the area used for business
- The date you began using the space for business
- Original purchase price paid for the property
- Summary of your utility expenses (gas, electric, oil, condo fees, landscaping, snowplowing, maintenance, etc)
- Major home improvements and direct office expenses (repairs, business phone, etc).

Residential Energy Efficient Improvements:

Please provide the cost of the following applicable items:

- High-efficiency heating & cooling systems, water heaters, windows, doors, insulation, qualified solar electric property, solar water heating property, fuel cell property, small wind energy property and geothermal heat pump property

Foreign Nationals on a F-1 or J-1 Visas:

Please bring your Visa and passport and summarize the following information:

- Your permanent address where you are a citizen
- Your F-1 / J-1 VISA number
- The actual dates entered / left the United States for corresponding tax year
- The number of days you were in the United States for the previous three tax years

Moving Expenses:

If your move is employment related, please summarize your moving expenses. You can only deduct the cost to move your household goods, storage and the one time trip to make the final move to your new location.

Finally, please bring any other official tax documents you received not mentioned above. When in doubt, bring it! Please keep good records of all income and expenses.