



Abundant Returns Tax Service
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Our Mission:
***“Keep More Money in
 Your Pocket!”***

Income Tax Filing Information

Important Tax Documents

(Gather these documents in order to file your taxes.)

(W-2) Income from Employers	(1099-S) Real Estate Sales
(W-2G) Gambling Winnings	(K-1) Shareholder’s Share of Income from Partnerships, LLCs or S-Corporations
(1098) Mortgage Interest Statement	Alimony
(1098-E) Student Loan Interest	Childcare Fee Statements
(1098-T) Tuition Statements	Donation Receipts & Statements
(1099-A) Acquisition or abandonment of secured property	IRA Deposits & Withdrawals
(1099-B) Stocks, Bonds, Bartering	Rental Property Income
(1099-C) Canceled Debt	Settlement Statements (Purchase or Sale of Property)
(1099-DIV) Dividend Statement	Social Security Benefits Statement
(1099-G) Unemployment Compensation/State Tax Refunds	Veterans Benefits Statement
(1099-INT) Interest Statements	Any statement you received that says
(1099-LTC) Long Term Care Benefits	“Important Tax Document”
(1099-Misc) Miscellaneous Income	
(1099-MSA) Medical Savings Accounts	
(1099-R) Pension/IRA/401(k) Distributions	

Medical Expenses

Insurance (<i>Out-of-Pocket & Withheld from check</i>)	Laser Eye Surgery	Weight Loss Programs for specific disease*
Co-Payments	Ambulance Service	Medical Center Treatment for Drug/Alcohol Addiction
Prescriptions/Birth Control/Insulin & supplies	Mileage to Medical Care	Special Schools for physically/mentally handicapped
Glasses/Contacts & Solution	Parking & Tolls	Transportation for physically/mentally handicapped
Hearing Aids & Batteries	Acupuncture/Chiropractor	Hand Controls for Car
Medical/Dental Exams	Artificial Limbs and Teeth	TTY Equipment/Installation
Eye Exams	Lodging while away from home for treatments	Oxygen Tanks & Equipment
Mental/Physical Therapy*	Nursing Help	
X-Rays, Labs, Clinics*	Hospital Care (<i>Including Meals & Lodging</i>)	<i>(*Must Be ordered or prescribed by Doctor)</i>
Braces/Dental Work	Long Term Care Services	
Crutches/Wheelchairs	Stop Smoking Programs & Prescriptions*	
Orthopedic Shoes		
Guide Dogs & their care		

Donations

Cash/Check (ex: Church, Feed the Hungry, etc)	Non-Cash Items (ex: Clothing, Furniture, Food)
Payroll Deduction (ex: United Way, Red Cross)	Date of Donation
Charitable Mileage	Non-Profit Organization Name
Other Charitable Costs	Address
Appraisal fees to determine the value of Donations	Items
	Value of Items

Other Deductions

State Tax Payments <i>(Other than job)</i>	Union Dues	Child Care Fees Paid
Estimated Taxes paid	Professional Association Fees	Investment & Broker Fees
Real Estate Taxes	Licenses/Permits	Internet Trading Fees
Car/Boat Tags	Uniforms/Protective Gear	Legal Fees/Advice
Motorcycle Tag	Boots	Safe Deposit Box
Educational Expenses	Uniform Maintenance <i>(Cleaning, Alterations)</i>	Professional Magazines
Roundtrip Mileage to Class	Tools required for job	Job Search
Books/Software	Continuing Education	Resumes/Printing
Testing Fees	Income Tax Preparation	Mileage (for interviews)
Tuition	Name of Child Care Provider	Employment Agency Fees
Mortgage Interest & Points	Address	Mailing Expenses
	Tax Id or SS#	Faxing Charges
		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 — <i>Complete this Section only if your office is located in your home.</i>
Catering	Music System (in Office)	<i>(Use Monthly Figures)</i>
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	Pager	Total Cost of Home
Equipment Purchases	Printing	Date Business Use Began
Item	Prizes	
Date Purchased	Referral Fees	
Cost	Rent (Office Space)	
Equipment Rental/Lease		