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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.)

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| <ul style="list-style-type: none"> (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 | <ul style="list-style-type: none"> (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” |
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Medical Expenses

(Total must be over 10% of your income)

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| <ul style="list-style-type: none"> Insurance (<i>Out-of-Pocket & Withheld from check</i>) 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 | <ul style="list-style-type: none"> 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 (<i>Including Meals & Lodging</i>) Long Term Care Services Stop Smoking Programs & Prescriptions* | <ul style="list-style-type: none"> 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
 <i>(*Must Be ordered or prescribed by Doctor)</i> |
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Donations

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| <ul style="list-style-type: none"> Cash/Check (ex: Church, Feed the Hungry, etc) Payroll Deduction (ex: United Way, Red Cross) Charitable Mileage Other Charitable Costs Appraisal fees to determine value of Donations | <ul style="list-style-type: none"> Non-Cash Items (ex: Clothing, Furniture, Food) Date of Donation Non-Profit Organization Name Address Items & Value |
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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	Faxing Charges	Security System/Alarms
Accountant	Freight	Software
Advertising	Furniture Purchased	Storage
Business Cards	Item	Supplies
Flyers/Posters	Date Purchased	Taxes
Stationery	Cost	Federal
TV/Radio	% of Business Use	State
Telephone Directory	Furniture Rental/Lease	Employer
Newspaper/Magazine	Gifts to Customers	Payroll
Billboards	Gifts to Employees	Business Property
Internet	Gifts to Other Businesses	Sales
Specialty Items (Pens, Cups, Magnets, etc)	Graphic Design	Tax Counseling
Answering Service	Insurance	Tax Preparation
Auto Expenses:	Liability	Telephone
Business Mileage _____	Disability	Office
OR	Errors & Omissions	Cellular
Actual Expenses	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 on Work Premises	
Bonds (Surety, Fidelity, etc)	Mortgage Interest (Purchase of Business Building)	Home Office
Catering	Music System (in Office)	<i>(Use Monthly Figures)</i>
Check Validation Service	Music (CDs/Tapes)	<i>Square Footage of Home</i>
Commissions	Office Supplies (Ex: Paper, Pens, Ink, etc.)	<i>Square Footage of Office</i>
Consultant Fees	Payroll Service	Monthly Rent
Contractors	Pension Plans	Annual Mortgage Interest
Courier Service	Profit Sharing	Electricity
Credit Card Terminal Rental	Employee Benefit Programs	Gas
Credit Card Service Fees	SEP	Water
Delivery Charges	401(k)	Sanitation
Decorating Expenses	Cafeteria Plan	Internet
Donations	Postage	Pest Control
Drinking Water	Post Office Box	HOA
Books	Professional Services	Repairs to Home
Classes/Seminars	Prof. Association Dues	Repairs to Office Space
Workshops/Conferences	Pager	Home Owners Insurance
Equipment Purchases	Printing	Security Alarm Service
Item	Prizes	Decorating/Painting Art/Plants
Date Purchased	Referral Fees	Total Cost of Home
Cost	Rent (Office Space)	Date Business Use Began
Equipment Rental/Lease	Sanitation	
Filing Fees		