Items Needed
to complete your return

Please bring all that apply to you

If you are a NEW client include:

1. Copy of prior year tax return
2. Picture ID & Social Security Cards
3. Birthdates for everyone on tax return

Income Information

- W2(s) Employment Income
- 1099-G(s) Unemployment Received
- 1099-NEC(s) Non Employee Compensation Income
- W2-G(s) Gambling Winnings and losses per win
- 1099-R(s)Retirement/IRA Distributions
- 1099-SSA(s) Social Security Received
- 1099-INT(s) Interest Income
- 1099-DIV(s) Dividends Income
- 1099-B(s) Sale of property/investments
- Farm income and expenses
- Form K-1(s) Partnerships, Trusts, S-Corps
- 1099-MISC(s) Miscellaneous Income
- Any additional income not listed

Sch A-Itemized Deductions (*if Qualify*)

- Property (Real Estate) Taxes paid
- 1098(s) Mortgage Interest paid
- Premium Mortgage Insurance (PMI)
- Excise tax paid on vehicle plates
- Out of pocket medical expenses (in excess of HSA used)
- Medical mileage
- Donations made to charitable organizations
- Charitable mileage

Other items, Deductions & Credits

- Form 8332 to Claim any Non Custodial Dependent
- Estimated tax payments (Dates & amounts made)
- Rent Paid including Landlord's Name and Address
- Educator Expenses (up to $250 out of pocket)
- 1098–E Student Loan Interest paid
- Indiana College Choice 529
  - Contributions and account #'s
- Child Care expenses paid
  - Provider name, address
  - identification #, amount paid
- 1098-T College Education expenses paid
- Private School costs for dependents
- Energy Efficient Home Improvements
- Electric Vehicle Purchases
- 1095-A, proof of Marketplace insurance (if applicable)
- 1099-SA(s) Health Savings Account Distributions
- Bank Information for direct deposit or pay balance due
  - Bank Routing & Account # 's

Schedule C Worksheet
Self Employed
Businesses / or Contractors

- Business Name and Address (if any)
- Federal ID # (if any)
- Gross Business Income
- Office in Home?
  - Total square foot of home and office
  - Utilities paid on home except water
  - Homehowners Insurance paid

Retail Businesses:

- Material and Supplies Purchased
- Beginning and Ending Inventory
- Merchandise Purchased for Resale

Business Expenses:

- Advertising
- Materials and Supplies Purchased
- Business Mileage
  - Travel Log Totals-Per Vehicle
  - <u>OR</u> Vehicle expense totals(actual expenses)
- Contract Labor/ 1099's issued
- Equipment Rental Expenses
- Gross Wages employees & employer taxes paid
- Travel Expenses
- Travel Meals (while away overnight)
- Mortgage Interest, Real Estate Taxes, Insurance
- Rent and Utilities Paid on Business Property
- Repairs and Maintenance (non-vehicle)
- Office Expenses
- Tools and Uniforms
- Legal and Professional Fees
- Insurance
  - Liability & Workman's Comp
  - Self-Employed Health Insurance Paid

Schedule E Worksheet for Each
Rental Property

- Rental Property Address
- Cost or Value & Date Placed in Service
- Rents Received
- Advertising Costs
- Cleaning and Maintenance
- Improvements that increase rental value
- Property Taxes & Mortgage Interest
- Legal and Professional Fees
- Management Fees
- Rental Related Mileage
- Repairs and Supplies
- Utilities you paid on Rental
- Insurance (other than health)

IRS Requires Income Tax Preparers to have proof of amounts provided to them "*before*" preparing a business form. Be prepared to provide a written or printed document containing all business totals to the preparer. Check out our website for helpful worksheets. kristels.com