

Items to Bring to your Appointment

Please bring all that apply to you

- ◆ Picture ID
 - ◆ **If new client:**
 1. Copy of prior year tax return
 2. Social Security Cards
 3. Birthdates for everyone on tax return
 - ◆ W2(s) Employment Income
 - ◆ 1099-G Unemployment Received
 - ◆ 1099-Misc(s) Miscellaneous Income
 - ◆ W2-G(s) Gambling Winnings and losses per win
 - ◆ 1099-R(s) Retirement/IRA Distributions
 - ◆ 1099-SSA Social Security Received
 - ◆ 1099-INT Interest Income
 - ◆ 1099-DIV Dividends Income
 - ◆ 1099-B Sale of property/investments
 - ➡ Bring both sale and purchase information
 - ◆ Farm income and expenses
 - ◆ Form K-1(s) from Partnerships, Trusts or S-Corporations
 - ◆ Estimated payments made
 - ➡ Dates paid and amounts paid
 - ◆ 1099-SA Health Savings Account Distributions
 - ◆ 1098(s) Mortgage Interest paid
 - ◆ Property (Real Estate) Taxes paid
 - ◆ Rent Paid including
 - ➡ Landlord's Name and Address
 - ◆ Excise tax paid on vehicle plates
 - ◆ Out of pocket medical expenses
 - Do NOT include Health Savings Accounts used**
 - ◆ Medical mileage
 - ◆ Donations made to charitable organizations
 - ◆ Charitable mileage
 - ◆ 1098-T College Education expenses paid
 - ◆ 1098-E Student Loan Interest paid
 - ◆ Child Care expenses include
 - ➡ Provider name, address
 - ➡ and identification #
 - ➡ Amounts separated by each child
 - ◆ 529 Plan Contribution amounts and account #'s
 - ◆ Private School costs for dependents
 - ◆ Energy Efficient Home Improvements,
 - ➡ Bring receipts for verification
 - ◆ Bank Information for direct deposit or balance due optional pay – include Bank Routing & Account #'s
- ◆ **1095-A, 1095-B, 1095-C (proof of Health insurance)**

Schedule C Worksheet Self Employed Businesses and/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
 - ➡ Homeowners 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 Logs-Per Vehicle
 - ➡ Vehicle expenses if using actual expenses
- ◆ Contract Labor/ 1099's issued
- ◆ Equipment Rental Expenses
- ◆ Insurance, Business and Liability
- ◆ Wages to employees and employer taxes paid
- ◆ Travel Expenses
- ◆ Travel Meals and Entertainment
- ◆ Client Meals and Entertainment
- ◆ Mortgage Interest, Real Estate Taxes, Insurance
- ◆ Legal and Professional Fees
- ◆ Repairs and Maintenance (non-vehicle)
- ◆ Office Expenses
- ◆ Rent and Utilities Paid on Business Property
- ◆ Tools and Uniforms
- ◆ Self-Employed Health Insurance Paid

Schedule E Worksheet for Each Rental Property

Rental Property Address

Property Cost or Value and Date Placed in Service

- ◆ Rents Received
- ◆ Advertising Costs
- ◆ Cleaning and Maintenance
- ◆ Improvements that increase rental value
- ◆ Property Taxes, Insurance and Mortgage Interest
- ◆ Legal and Professional Fees
- ◆ Management Fees
- ◆ Rental Related Mileage
- ◆ Repairs and Supplies
- ◆ Utilities you paid on Rental

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