

What do I need to gather for preparing my tax return?



Personal Information:

- Your SSN & copy of Driver License
- Your spouse's SSN & copy of Driver License
- For new clients, please upload your last filed tax return

Information for your dependents on your return:

- Dependent date of births and his/her social security card
- Daycare provider: amount paid, provider ID and address
- Copy of your divorce decree or a signed document showing your ex-spouse is releasing his/her right to claim the child. Please upload IRS form 8332 if you have one completed and signed. This gives you immediate authorization to claim the child on your tax return.

Adjustments to income:

- Amount deposited into tax deferred retirement accounts
- Value of IRAs on the last day of the year

Credits:

- Forms 1098-T and 1098-E, if you received them
- Info for any scholarships or fellowships not disclosed on 1098-T
- Out of pocket text books and supplies receipts

Income information:

- All W-2's
- All 1099's issued to you, income that no 1099 was issued and income for anyone else on the tax return
- Rental Income and expenses
- Depreciation asset schedule for any rentals or businesses (description, costs, date placed in service, depreciation taken). You may need to ask for this schedule from previous tax preparer.
- Unemployment income
- Jury Duty
- Gambling income (W-2G or your records of income and expenses)
- Health care reimbursements (1099-SA or 1099-LTC)
- Hobby income and expenses
- Prize and awards income
- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S). Please include dates of acquisition and records of your cost or other basis in property you sold
- K-1's from your investments
- Retirement Income such as Pension, IRA or annuity income (1099-R)

_____ Social security/RRB Income (1099-SSA, RRB-1099)



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**Itemizing Deductions – only if >\$13,850 if filing single;
>27,700 if married filing status:**

- _____ Forms 1098 or other mortgage statements
- _____ Amount of state/local income tax paid (other than wage withholding)
- _____ Real estate and personal property tax records
- _____ Receipt for large purchases showing sales tax paid
- _____ Hud statement showing closing date of home purchase
- _____ Receipts for amounts donated to houses of worship, schools, other charitable organizations
- _____ Records of non-cash charitable donations
- _____ Medical costs such as doctors, dentists or hospitals expenses
- _____ Mileage for charitable or medical purposes
- _____ Amount paid for preparation of your prior year tax return

Business use of vehicle:

- _____ Total miles driven for business, commuting and other
- _____ Total paid for parking and tolls while traveling on business trips
- _____ If not using standard mileage rate, you can claim actual expenses. Please have an itemized list with totals for: gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Business write offs:

- _____ Total Business Expenses listed by category (please download non employee expense form from our website)

Federal declared disaster area:

- _____ upload records to support property losses:
 - address of property
 - expenses for unreimbursed to rebuild or repair property
 - clean up costs
 - appraisal costs
 - insurance reimbursements
 - FEMA assistance information

Don't know if you are in a federally approved disaster area? Please visit: www.fema.gov.

Note: When possible ask for a Tax Organizer. This organizer will give you more details on business related info needed.