***Our Motto***:

“***Life is what you make it!!!***

**Income Tax Filing Information**

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

(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-Q) Qualified Education Program

(1099-R) Pension/IRA/401(k) Distributions

(1099-S) Real Estate Sales

(1099-SA) Health Savings Accounts

(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

RailRoad Benefits Statements

Veterans Benefits Statement

Any statement you received that says **“Important Tax Document”**

**Medical Expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Insurance (*Out-of-Pocket &*

*Withheld from paycheck)*

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

Laser Eye Surgery

Ambulance Service

Mileage to/from Medical Care

Parking & Tolls

Acupuncture/Chiropractor

Artificial Limbs and Teeth

Lodging while away from home

for treatments

Nursing Help

Hospital Care (*Including Meals*

*& Lodging)*

Long Term Care Services

Stop Smoking Programs &

Prescriptions**\***

Weight Loss Programs for

specific disease\*

Medical Center Treatment for

Drug/Alcohol Addiction

Special Schools &

Transportation for

physically/mentally

handicapped

Hand Controls for Car

TTY Equipment/Installation

Oxygen Tanks & Equipment

*(****\*****Must Be ordered or*

*prescribed by Doctor)*

**Donations\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Cash/Check (ex: Church, Feed the Hungry, etc)

Payroll Deduction (ex: United Way, Red Cross)

Charitable Mileage

Other Charitable Costs

Appraisal fees to determine the value of Donations

Non-Cash Items (ex: Clothing, Furniture, Food)

Date of Donation

Non-Profit Organization Name

Address

Items

Value of Items

**Other Deductions\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

State Tax Payments

*(Other than thru your job*)

Estimated Taxes paid

Real Estate Taxes

Car/Boat Tags

Motorcycle Tag

Educational Expenses

Roundtrip Mileage to Class

Books/Software

Testing Fees

Tuition

Mortgage Interest & Points

Union Dues

Professional Association Fees

Licenses/Permits

Uniforms/Protective Gear

Boots/Gloves/Safety Goggles

Uniform Maintenance

*(Cleaning, Alterations*)

Tools required for job

Continuing Education

Income Tax Preparation

Name of Child Care Provider

Address

Tax Id or SS#

ChildCare Fees Paid

Investment & Broker Fees

Internet Trading Fees

Legal Fees/Advice

Safe Deposit Box

Professional Magazines

529 Plan Contributions

Loans made to family/friends

that have not been repaid

Job Search

Resumes/Printing

Mileage (for interviews)

Employment Agency Fees

Mailing Expenses

Faxing Charges

Travel

**Moving Expenses**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(\*Must be More than* ***50 Miles*** *in connection with Job)*

Date of Move

Old Home City

New Home City

Truck Rental

Amount Employer Reimbursed

Mileage: old home to new job

Mileage: old home to old job

Packing Materials

Hotels

Moving Company Fees

Storage

**Rental Property\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Each property’s expenses must be listed separately.*

Date Purchased

Purchase Price

Property Address

Date Sold

Selling Price

Date Rented

Rent Received

Advertising

Appliances

Item

Date of Purchase

Cost

Appraisals

Assessment Fees

Blinds/Curtain

Bookkeeping

Carpet

Cleaning Service

Cleaning Supplies

Closing Costs

Commissions

Contractor Fees

Decorating Costs

Deposits

Electrician

Fence

Filing Fees

Fire Extinguishers

Floors

Furniture

Item

Date of Purchase

Cost

Homeowners Association

Fees

Installation Fees

Inspections

Insurance

Investment Counseling Costs

Lawn Maintenance

Leasehold Improvements

Lease Preparation

Legal Fees

Maintenance

Major Improvements

Management Fees

Mileage

Misc. Items (Light Bulbs, Door

Knobs, Faucets, etc)

Mortgage Interest

Moving Expenses for

Equipment/Appliances

Office Supplies/Books

Office Rent

Painting

Pest Control

Plants/Flowers

Plumbing

Points

Refinance Charges

Rent Received

Rent Collection Costs

Repairs

Roof

Sanitation

Salaries

Security System

Smoke Alarms

Stationery & Supplies

Supplies

Taxes

Tax Counseling

Tax Return Preparation

Traveling Expenses

Utilities

**Self Employment/**

**Business Deductions\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Income

Accountant

Advertising

Business Cards

Flyers/Posters

Stationery

TV/Radio

Telephone Directory

Newspaper/Magazine

Billboards/Signs

Internet Banners/etc.

Specialty Items (Pens, Cups,

Magnets, etc)

Answering Service

**Auto Expenses**:

Business Miles

Commuting Miles

Personal Miles

Total Mileage for the year

Monthly Payment

Total Cost of Vehicle

Make, Model & Year

Date Business Use Began

Parking/Tolls

Gas/Oil

Car Washes/Waxes

Insurance

Garage Rent

Tires/Accessories

Repairs

Inspection/Registration

Taxes

Banking Fees

Billing Service

Bookkeeping

Bonds (Surety, Fidelity, etc)

Catering

Check Validation Service

Commissions

Consultant Fees

Contractors

Courier Service

Credit Card Terminal Rental

Credit Card Service Fees

Delivery Charges

Decorating Expenses

Donations

Drinking Water

Books

Classes/Seminars

Workshops/Conferences

Equipment Purchases

Item

Date Purchased

Cost

Equipment Rental/Lease

Filing Fees

Faxing Charges

Freight

Furniture Purchased

Item

Date Purchased

Cost

% of Business Use

Furniture Rental/Lease

Gifts to Customers

Gifts to Employees

Gifts to Other Businesses

Graphic Design

Insurance

Liability

Disability

Errors & Omissions

Health

Life

Malpractice

Workers Compensation

Information Services

Internet Service/DSL

Interest on Business Loans

Inventory

Janitorial Service

Licenses/Permits

Legal Fees

Magazine/Newsletter

Subscriptions

Mailing Lists

Marketing Promotions

Market Research

Meals & Entertainment

Mortgage Interest (Purchase of

Business Building)

Music System (in Office)

Music (CDs/Tapes)

Office Supplies (Ex: Paper,

Pens, Ink, etc.)

Payroll Service

Pension Plans

Profit Sharing

Employee Benefit Programs

SEP

401(k)

Cafeteria Plan

Postage

Post Office Box

Professional Services

Prof. Association Dues

Pager

Printing

Prizes

Referral Fees

Rent (Office Space)

Sanitation

Security System/Alarms

Software

Storage

Supplies

Taxes

Federal

State

Employer

Payroll

Business Property

Sales

Tax Counseling

Tax Preparation

Telephone

Office

Cellular

Travel

Air Fare

Cab Fare

Hotel

Tools

Utilities

Electricity

Gas

Sanitation

Water

Cable (Commercial Office Only)

Uniforms

Purchase

Cleaning/Maintenance

Website/Web Hosting

Wages

**Home Office**—*Complete this*

*Section only if your office is*

*located in your home.*

Total Sq. Footage of Home

Sq. footage of Office Area

Monthly Rent

Mortgage Payment

Utilities

Electricity

Gas

Water

Garbage

Repairs to Home

Repairs to Office Space

Home Owners Insurance

Association Fees

Security Alarm Service

Decorating/Painting Art/Plants

Total Cost of Home

Date Business Use Began