

## **THINGS TO REMEMBER FOR YOUR TAXES**

- 1) DON'T FORGET TO BRING YOUR W2'S.**
- 2) IF YOU ITEMIZE BRING YOUR SUPPORTING DOCUMENTS LIKE MORTGAGE INTEREST AND REAL ESTATE TAXES. IF YOU BOUGHT OR SOLD A HOUSE, BRING THE HUD 1 OR SETTLEMENT STATEMENT. SCHOOL TUITION, DAYCARE, AND UNION DUES ARE ALSO DEDUCTIONS. UNREIMBURSED EMPLOYEE EXPENSES WHICH INCLUDE, BUT MAY BE SUBJECT TO A 2% LIMITATION OF YOUR ADJUSTED GROSS INCOME ARE, UNIFORMS, WORK BOOTS OR SHOES, SCHOOL SUPPLIES ( IF YOU ARE A TEACHER ), TOOLS.**
- 3) ALL CHARITABLE CONTRIBUTIONS MUST HAVE PROOF IN WAY OF CANCELLED CHECKS, CREDIT CARD RECEIPT, OR WRITTEN RECEIPT FROM DONATION SITE.**
- 4) IF YOU HAVE A SCHEDULE C OR SELF-EMPLOYMENT INCOME, HAVE YOUR TOTAL INCOME AND EXPENSES CALCULATED. YOUR BEGINNING AND ENDING MILEAGE FOR THE YEAR, INCLUDING YOUR ODOMETER READING FROM JANUARY 1, TILL DECEMBER 31. IF YOU HAVE A JOB THAT REQUIRES YOU TRAVEL, MEALS AND HOTEL EXPENSES ARE ALSO POSSIBLE DEDUCTIONS.**
- 5) FOR OFFICE IN THE HOME, YOU NEED TOTAL SQUARE FOOTAGE OF HOME, AND SQUARE FOOTAGE OF ROOM YOU USE FOR OFFICE. THE POWER BILL DEDUCTION IS BASED ON A PERCENTAGE OF THIS, SO WE WILL NEED THE TOTAL OF THAT EXPENSE FOR THE YEAR. ANY OFFICE SUPPLIES, INTERNET, AND ANY OTHER APPLICABLE EXPENSES.**
- 6) IF YOU BOUGHT A VEHICLE, BOAT, ETC, BRING THE SALES TAX YOU PAID WHEN YOU PURCHASED IT.**
- 7) IF YOU HAD ANY STOCK SALES, PLEASE MAKE SURE THAT YOU HAVE THE COST BASIS ON THE FORM 1099B, THIS WILL HELP YOUR PREPARER BE ABLE TO COMPLETE YOUR TAXES IN A TIMELY MANNER.**
- 8) PLEASE UNDERSTAND THESE ARE GUIDELINES IN WHICH TO PREPARE FOR HAVING YOUR TAXES DONE. FOR A MORE DETAILED LIST, PLEASE CALL**

**OUR OFFICE FOR MORE INFORMATION. OUR COMPANY WISHES TO HAVE YOUR TIME IN OUR OFFICE AS EASY FOR YOU AS IT IS FOR US. WE APPRECIATE THE OPPORTUNITY TO BE OF SERVICE TO YOU, AND WE VALUE YOU AS CLIENTS.**