



2016 TAX PREPARATION DOCUMENTS

PERSONAL INFORMATION

- Your social security number (SSN) or tax ID number (TIN)
- Your spouse's full name, SSN or TIN

DEPENDENT(s) INFORMATION

- Birth dates, SSN or TIN
- Childcare expense records (including the provider's tax ID number)
- Income of other adults in your home
- Form 8332 (child's custodial parent releases their right to claim a child to you)

SOURCES of INCOME

- Employed - W-2
- Self-Employed
 - ✓ Forms 1099-MISC
 - ✓ Schedules K-1
 - ✓ Income records to verify amounts not reported on 1099s
 - ✓ Records of all expenses
 - ✓ Business-use asset information (cost, date placed in service, etc.) for depreciation
 - ✓ Home office information
 - ✓ Estimated tax payments (Form 1040ES)
- Rental Income
 - ✓ Records of income and expenses
 - ✓ Rental asset information (cost, date placed in service, etc.) for depreciation
 - ✓ Estimated tax payments (Form 1040ES)
- Retirement Income
 - ✓ Pension/IRA/annuity income (1099-R)
 - ✓ Traditional IRA basis
 - ✓ Social security/RRB income (1099-SSA, RRB-1099)
- Savings & Investments or Dividends
 - ✓ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
 - ✓ Income from sales of stock or other property (1099-B, 1099-S)
 - ✓ Dates of acquisition, records of cost or other basis in property sold (if basis is not reported on 1099-B)
 - ✓ Health Savings Account, long-term care reimbursements (1099-SA or 1099-LTC)
 - ✓ Expenses
 - ✓ Estimated tax payments (Form 1040ES)
- Other Income & Losses
 - ✓ Gambling income (W-2G or records showing income, as well as expense records)
 - ✓ Jury duty records
 - ✓ Hobby income and expenses
 - ✓ Prizes and awards
 - ✓ Trusts
 - ✓ Royalty Income 1099 Misc.
 - ✓ Any other 1099s received
 - ✓ Alimony paid/received with ex-spouse's name (SSN)

GET YOUR REFUND NOW!
Professional Tax Preparation
& Filing Services Available**
9am to 7pm | Mon thru Sat

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*Certain conditions apply. See website for details. **Tax preparation and IRS fees may apply. Offer expires 3/31/17



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TYPES of DEDUCTIONS

- Home Ownership
 - ✓ Forms 1098 or other mortgage interest statements
 - ✓ Real estate and personal property tax records
 - ✓ Receipts for energy-saving home improvements
 - ✓ All other 1098 series forms
- Charitable Donations
 - ✓ Cash amounts donated to houses of worship, schools, other charitable organizations
 - ✓ Records of non-cash charitable donations
 - ✓ Amounts of miles driven for charitable or medical purposes
- Medical Expenses
 - ✓ Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Health Insurance
 - ✓ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
 - ✓ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
 - ✓ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)
- Childcare Expenses
 - ✓ Fees paid to a licensed day care center or family day care for care of an infant or preschooler.
 - ✓ Wages paid to a baby-sitter.
- Educational Expenses
 - ✓ Forms 1098-T from educational institutions
 - ✓ Receipts that itemize qualified educational expenses
 - ✓ Records of any scholarships or fellowships you received
 - ✓ Form 1098-E if you paid student loan interest
- Job Expenses & Tax Prep Fees
 - ✓ Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
 - ✓ Receipts for classroom expenses (for educators in grades K-12)
 - ✓ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
 - ✓ Job-hunting expenses
 - ✓ Record of moving expenses not reimbursed by employer
 - ✓ Amount paid for preparation of last year's tax return
- State & Local Taxes or Sales Tax
 - ✓ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
 - ✓ Invoice showing amount of vehicle sales tax paid
- Retirement & Other Savings
 - ✓ Form 5498-SA showing HSA contributions
 - ✓ Form 5498 showing IRA contributions
 - ✓ All other 5498 series forms (5498-QA, 5498-ESA)



DRIVE CASA

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2016 TAX PREPARATION DOCUMENTS

- Federally Declared Disaster

- ✓ City/county you lived/worked/had property in
- ✓ Records to support property losses
- ✓ Records of rebuilding/repair costs
- ✓ Insurance reimbursements/claims to be paid
- ✓ FEMA assistance information
- ✓ Check FEMA site to see if my county has been declared a federal disaster area