TAX PREPARATION HELP SHEET

The Affordable Accountant LLC

This sheet is provided as a help for you to gather information required to file your income taxes and is not intended to be all-inclusive of materials you may need to complete your tax return.

DATE OF TAX APPOINTMENT________________ TIME OF TAX APPOINTMENT_______________

ADDRESS OF TAX APPOINTMENT: 411 W 7200 S Suite 103, MIDVALE UTAH 84047
ADDRESS OF TAX APPOINTMENT: 1503 NORTH 1825 WEST, CLINTON, UTAH 84015
FAMILY INFORMATION

FILER'S NAME___________________________________ FILER'S DOB_________________________

FILER'S SSN _______ _______ ______ FILER'S ADDRESS_______________________________________

FILER'S CELL#______________________________

FILER'S E-MAIL ADDRESS____

SPOUSE'S NAME________________________________ SPOUSE'S DOB_______________________

SPOUSE'S SSN________ _______ _________ SPOUSE'S CONTACT #___________________________

DEPENDENT #1 NAME______________________________________ DOB____________________

DEPENDENT #1 SSN_________ ____ _________ DEPENDENT #1 RELATIONSHIP_______________

DEPENDENT #2 NAME_____________________________________ DOB_____________________

DEPENDENT#2 SSN_________ ____ ________ DEPENDENT#2 RELATIONSHIP_________________

DEPENDENT #3 NAME_____________________________________ DOB_____________________

DEPENDENT #3 SSN________ _____ ________ DEPENDENT #3 RELATIONSHIP________________

FOR ANY ADDITIONAL DEPENDENTS, PLEASE LIST THEM ON A SEPARATE SHEET/OR BACK OF THIS SHEET

TAX INFORMATION TO BRING WITH YOU

____ Last Year's Tax Return (only if this is your first time filing with me)

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____ W2 Forms ______ Employee Wages Filer's ______ Employee Wages Spouse's

____1099 INT – Interest Earnings ____FILER'S 1099 INT ____ SPOUSE'S 1099 INT

____1099 DIV – Dividend Earnings ____FILER'S 1099 DIV ____SPOUSE'S 1099 INT

____1099 B – Sale of Stock ____FILER'S 1099 B ____SPOUSE'S 1099 B

____1099 C – Cancellation of Debt ____FILER'S 1099 C ____SPOUSE'S 1099 C

____1099 G – Prior year's State Tax Refund Amount

____1099 R – Retirement Income ____FILER'S 1099 R ____SPOUSE'S 1099 R

____1099 R – IRA Withdrawal ____FILERS 1099 R ____SPOUSE'S 1099 R

____1099 R – 401 (K) Withdrawal ____FILER'S 1099 R ____SPOUSE'S 1099 R

____1099 MISC – Self Employment Income for FILER and/or SPOUSE.

____Self Employment Expenses - **RECEIPTS SHOULD BE ON FILE IN CASE OF AN AUDIT**

____Home Business Income for FILER and/or SPOUSE

____Home Business Expenses for FILER and/or SPOUSE. **RECEIPTS SHOULD BE ON FILE.** **E**xpenses should be itemized to help expedite the tax return

____Rental Income. Income and Expenses information is required for Each House Rented.

____Schedule F – Farm Records

____Alimony – Received and paid with SSN of receiver

____Home Sale and/or Purchase

____W2-G – Lottery or Gambling Income/Losses - FILER and/or SPOUSE

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____Commission Payments – FILER and/or SPOUSE

____K1's   FILER/SPOUSE and/or DEPENDENTS

____ Income received from any other sources. FILER, SPOUSE and/or DEPENDENTS

DEDUCTIBLE ITEMS

____1098 T – Tuition & Education Expenses

____1098 E – Student Loan Interest

____ Educator Expenses - FILER and/or SPOUSE

____ Reservist Expenses - FILER and/or SPOUSE

____ IRA Contributions & amounts – Name of the holder. FILER, SPOUSE and/or DEPENDENTS

____ ROTH IRAs are deductible on taxes based on AGI

____ Out of Pocket Medical Expenses for Doctors, Hospitals, Dentists, Medical Equipment, FILER, SPOUSE and/or DEPENDENTS

____ Miles driven for Doctors, Hospitals, Dentists, and Other Medical visits. FILER and/or SPOUSE

____ Medical, Dental Insurance that are out of pocket.   FILER, SPOUSE and/or DEPENDENTS

____ Medical, Dental, or other Providers that require out-of-pocket deductibles for office, Hospital visits not covered by insurance

____ FORMS 1095 A, B, C or Exemption Form   FILER and/or SPOUSE

____ TAXES PAID for Major Purchases either Business or Personal – FILER and/or SPOUSE

____ TAXES PAID for Real Estate (First and Second Homes - FILER and/or SPOUSE

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____ Personal Property Taxes Paid. (Homes and/or Property)

____ Auto, Boat, RV's, etc. Taxes Paid

____ Mortgage Interest Paid

____ Closing Costs related to Refinance and/or New Purchases

____ Mortgage Points Paid

____ Mortgage Insurance Premiums

____ Charitable Contributions over $500.00 – Cash, Check, Donor Receipts **Required**

____ Charitable Contributions up to $500.00 do not require Receipts and can be taken by any filer itemizing their tax return

____ Miles driven doing Charitable work using your vehicle

____ Miles driven in own vehicle for work. A log showing miles driven for the year is **Required**

____ Expenses required to purchase and/or clean work-related clothing

____ Vehicle Expense Records when using a personal vehicle for work-related tasks

____ Union Dues, Professional Licensing Fees, etc.

____ Job Seeking Expenses

____ Unreimbursed Employment Expenses such as Educational, transportation, hotels, etc.

____ Casualty & Theft Loss, property, home, auto

____ Child Care Expenses – Need Provider's Names, Addresses, taxpayer's ID# or EIN, amount Paid to each Provider for each child.

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____ Estimated taxes paid, if any, by Quarter (Federal/State)

It is important that you retain the proper receipts and/or mileage/gas logs for the tax year you are claiming these items. **It is not the responsibility of your Tax Preparer to estimate these deductions.** If a Tax Audit is required by the IRS, it is the TaxPayers' sole responsibility to provide the necessary receipts to satisfy the IRS Audit.

If you are NEW to The Affordable Accountant, please bring a copy of your last year's Tax Return to your appointment with you.

IF YOU HAVE ANY COMMENTS, QUESTIONS, CONCERNS, please list them below……………………..: