TAX PREPARATION HELP SHEET

The Affordable Accountant

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: 5428 S APPIAN WAY, TAYLORSVILLE, UTAH (3020 W 5400 S)
ADDRESS OF TAX APPOINTMENT: 1503 NORTH 1825 WEST, CLINTON UTAH
FAMILY INFORMATION

FILER'S NAME___________________________________ FILER'S DOB_________________________

FILER'S SSN __________ _______ _________ FILER'S ADDRESS______________________________

FILER'S CELL#___________________ HOME#___________________ WORK#___________________

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_______________

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

TAX INFORMATION TO BRING WITH YOU

_____ Last Year' Tax Return

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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.** Expenses should be itemized to help expedite the tax return

_____Rental Income. Income and Expenses information 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 IRA's are not deductible on taxes

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

____ Miles driven for Doctor, Hospital, Dentists, Other Medical visits. FILER and/or SPOUSE

____ Medical, Dental Insurances 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 own 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 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 Providers Names, Addresses, taxpayer's ID# or EIN, amount Paid to each Provider for each child.

____ 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 or your last year's Tax Return to your appointment with you.

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