Individuals

Tax Preparation and Planning Services

Filing Requirements – Individuals - Documents Showing Income For The Year:

- Employment Information
  - W-2s from employers,
- Self-Employment
  - 1099-MISC Forms from self-employment income
  - K-1 Forms for income from a partnership, small business, or trust,
  - Records of all expenses — check registers or credit card statements, and receipts
  - Business-use asset information (cost, date placed in service, etc.) for depreciation
  - Office in home information, if applicable
- Savings & Investment
  - 1099-INT (Interest), 1099-DIV (Dividends) and 1099-OID(Original Issue Discount) Forms
  - 1099-B Forms showing brokerage trades in stocks and bonds
  - 1099-S Form that reports Proceeds from Real Estate Transactions, to report the sale or exchange of real estate. Dates of acquisition and records of your cost or other basis in property you sold
- Rental Income
  - Records of income and expenses
  - Rental asset information (cost, date placed in service, etc.) for depreciation
- Retirement Income
  - Pension/IRA/annuity income (1099-R)
  - Social security/RRB income (1099-SSA, RRB-1099)
- Other Income

- Unemployment, state tax refund (1099-G)
- Additional income not reported on a W-2 or 1099 form which This could be a spreadsheet, bank statements, or other written evidence.
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- 1099-SSA Form showing Social Security received.
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

Filing Requirements – Individuals – Expenses Reported :

- **Itemizing Deductions**
  - Mortgage interest on Form 1098 and other mortgage statements
  - Forms 1098 or other mortgage statements
  - Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
  - Real estate and personal property tax records
  - Invoice showing amount of vehicle sales tax paid
  - HUD statement showing closing date of home purchase
  - Gifts to houses of worship, churches, schools, other charitable organizations
  - Records of non-cash charitable donations
  - Amounts paid for healthcare insurance and to doctors, dentists, hospitals
  - Amounts of miles driven for charitable or medical purposes
  - Expenses related to your investments
  - Amount paid for preparation of your 2010 tax return

- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Canceled checks, receipts, or spreadsheets for any tax-related expenses.

- **Education Payments**
  - Student loan interest reported on Form 1098-E, 1098-T.
  - Scholarships and fellowships
  - College Expenses & Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- If you paid estimated taxes, bring a summary of your federal and state estimated payments and canceled checks.
- **Vehicle Information**
  - Total miles driven for the year (or beginning/ending odometer readings)
  - Total business miles driven for the year (other than commuting)
  - Amount of parking and tolls paid
  - If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.
- **If you were affected by a federally declared disaster**
  - City/county you lived/worked/had property in
  - Records to support property losses (appraisal, clean up costs, etc.)
  - Records of rebuilding/repair costs
  - Insurance reimbursements/claims to be paid
  - FEMA assistance information http://www.fema.gov/apply-assistance
  - Check FEMA site to see if my county qualifies for individual assistance http://www.fema.gov/