

# Lynda R. Mohs Tax Service

*"We work for you, Not the IRS!"*

## Happy New Year!!

YEAR \_\_\_\_\_

The IRS is still heavy into audits – KEEP YOUR RECEIPTS! WE EXPECT TO CONTINUE TO SEE A LOT OF AUDITS IN THE NEXT YEAR. If you receive an audit letter, call our office and come in to sign a Power of Attorney to have Lynda represent you – for fees starting as low as \$100.00 per hour. They are also busy with Identity Theft.

## HEALTH CARE COSTS

Do all members of your family have health insurance? \_\_\_\_\_ YES \_\_\_\_\_ No If "YES" bring In form **1095A, 1095B or 1095C.**

## WHAT TO BRING TO YOUR TAX APPOINTMENT

1. **A copy of last year's return.**
2. **Each person's Name, D.O.B. and Social Security Number (Soc. Sec. Card if new client).**
3. **Proof of INCOME EARNED:**
  - A. W2 FORMS, 1099 FORMS AND K-1 FORMS
  - B. INVESTMENTS: 1099'S for Dividends, Interest, Stock Sales & Stock Purchases
  - C. UNEMPLOYMENT RECEIVED? \$ \_\_\_\_\_ SOCIAL SECURITY? \_\_\_\_\_ (Bring forms)
  - D. DOCUMENTATION OF ALL OTHER FORMS OF INCOME (1099-Misc., Foreign Income, etc.)
  - E. BRING HSA OR MSA PAPERWORK, and FORM 1095
4. **Proof of EXPENSES:**
  - A. TOTAL OUT-OF-POCKET MEDICAL EXPENSES: \$ \_\_\_\_\_ AND INSURANCE PREMIUMS
  - B. MORTGAGE INTEREST PAID: \$ \_\_\_\_\_ PROPERTY TAXES PAID: \$ \_\_\_\_\_
    - Interest on a Contract for Deed requires you to bring Name, Address and SS# of Contract Holder.
  - C. CLOSING PAPERS FROM ALL PURCHASES/SALES/REFINANCES.
  - D. CURRENT YEAR'S PROPERTY TAX STATEMENT AND/OR CRP FORM.
  - E. CONTRIBUTIONS:  
CASH/CHECK: \$ \_\_\_\_\_  
NON-CASH: \$ \_\_\_\_\_ (Dated receipts and details)
  - F. UNION DUES: \$ \_\_\_\_\_ UNREIMBURSED JOB EXPENSES: \$ \_\_\_\_\_
  - G. JOB SEARCH EXPENSES: \$ \_\_\_\_\_
  - H. MOVING EXPENSES: \$ \_\_\_\_\_ (If you moved 50+ miles because of a new job.)
  - I. DAYCARE/PRESCHOOL EXPENSES PAID: \$ \_\_\_\_\_ Please bring Name, Address and Social Security Number (or Fed. ID#) for Daycare Provider.
  - J. EDUCATION EXPENSES FOR K-12 DEPENDENTS: \$ \_\_\_\_\_
  - K. COLLEGE/TECH EDUCATION EXPENSES FOR SELF OR DEPENDENT (Bring college papers/**1098-T**)  
TUITION & FEES: \$ \_\_\_\_\_  
BOOKS: \$ \_\_\_\_\_
  - L. STUDENT LOAN INTEREST PAID: \$ \_\_\_\_\_
  - M. IRA, SEP, OR KEOGH CONTRIBUTIONS: \$ \_\_\_\_\_ WITHDRAWALS: \$ \_\_\_\_\_  
ROLLOVERS: \$ \_\_\_\_\_ (Please bring documentation of any such transactions.)
  - N. IF YOU RECEIVED OVER \$10,000 FROM ANY NON-TAXABLE FOREIGN SOURCES, YOU MUST REPORT IT TO AVOID A 50% PENALTY, BUT IT WILL REMAIN TAX FREE. FOREIGN FBAR RETURNS ARE NOW DUE **APRIL 15<sup>TH</sup>**, NOT JUNE 30<sup>TH</sup>.

### FREE ELECTRONIC FILING!\*

*\*Available only with paid tax preparation at Lynda Mohs Tax Service*