

# 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.

## HEALTH CARE COST

All health care insurance through employer for all members of your family \_\_\_\_\_ Yes \_\_\_\_\_ No If "NO" bring in all insurance information as stated on the Home page.

## WHAT TO BRING FOR YOUR TAX APPOINTMENT:

- 1 A copy of last year's tax return.
- 2 Each person's Name, D.O.B., and Soc. Security Number (State License or I.D with Picture for adults).
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 1095A, 1095B, or 1095C
- 3 Proof of EXPENSES:
  - A. TOTAL MEDICAL EXPENSES: \$ \_\_\_\_\_ (Must exceed 10% of Income to count.)
  - 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: \$ \_\_\_\_\_
  - 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: \$ \_\_\_\_\_ (who, what, why, amount)
  - K. COLLEGE/TECH. EDUCATION EXPENSES FOR SELF OR DEPENDENT (Bring College Papers):
    - 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 \$10,000.00 FROM ANY NON-TAXABLE FOREIGN SOURCES, YOU MUST REPORT IT TO AVOID A 50% PENALTY BUT IT WILL REMAIN TAX FREE.

## FREE ELECTRONIC FILING!\*

\*Available Only With Paid Tax Preparation at Lynda Mohs Tax Service