

# Lynda R. Mohs Tax Service

Saint Paul, MN 55116

*"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.

## WHAT TO BRING FOR YOUR TAX APPOINTMENT:

- 1 A copy of last year's tax return.
- 2 Each person's name, DOB, Social Security Number (Social Security card if new client or name change).
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. BRINGS HSA OR MSA PAPERWORK AND FORM 1095A IF YOU GOT INSURANCE THROUGH THE MARKETPLACE.

### 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.  
CURRENT YEAR'S PROPERTY TAX STATEMENT AND/OR CRP FORM.
- D. CONTRIBUTIONS:  
CASH/CHECK: \$\_\_\_\_\_  
NON-CASH: \$\_\_\_\_\_
- E. DAYCARE/PRESCHOOL EXPENSES PAID: \$\_\_\_\_\_
  - Please bring Name, Address, and Social Security Number (or Fed. ID#) for Daycare Provider.
- F. EDUCATION EXPENSES FOR K-12 DEPENDENTS: \$\_\_\_\_\_ (who, what, why, amount)
- G. COLLEGE/TECH. EDUCATION EXPENSES FOR SELF OR DEPENDENT (Bring College Papers):  
TUITION & FEES: \$\_\_\_\_\_  
BOOKS: \$\_\_\_\_\_
- H. STUDENT LOAN INTEREST PAID: \$\_\_\_\_\_
- I. IRA, SEP, OR KEOGH CONTRIBUTIONS: \$\_\_\_\_\_ WITHDRAWALS: \$\_\_\_\_\_  
ROLLOVERS: \$\_\_\_\_\_ (Please Bring Documentation of any such transactions.)
- J. 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