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What to Bring

Personal Tax Information

Tax Time

- *Copy of your prior year tax returns.
- *Original forms W-2 and 1099's received from all employers.
- * Copies of other compensation, moving expense reimbursement, or pension documentation, and Social Security Income.
- * Form(s) 1099 or other statements reporting interest and dividend income received.
- * Forms(s) 1098B and any other closing documentation regarding the sale or purchase of assets.
- *Schedule K-1 showing your share of income and deductions from partnerships, S corporations, estates and trusts.
- *Forms 1098, copies of real estate bills, property tax bills, mortgage statements, etc.

- * IRS mailing label on which your name, address, and social security number have been preprinted.
 - *Any other information or statements that you received or that you may have questions about.
 - *CP Notice 28 - Taxable IRA from Roth Rollover.
 - *Children born during the tax year - Date of Birth - Social Security Cards.
 - *Child Care Provider Year to Date Statements.
 - *The amount of stimulus received.
- If your not sure what else to bring, look at your last years return. Go over it line by line to get an idea of what you may need.

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Special Points of Interest and Don't Forgets.

- ✓ Rental Income Information
- ✓ Farm Income Information
- ✓ Church and Charitable Contribution Receipts.
- ✓ Higher Education Expenses
- ✓ Medical Expenses.
- ✓ Un-reimbursed Employer Expenses
- ✓ Gambling Losses to Extent of gambling winnings
- ✓ Stock Sale information. Including not only sale but original purchase date and amount.
- ✓ Installment Sale information
- ✓ Address Changes
- ✓ Status Changes
- ✓ Birth or Death of Dependent or Spouse.
- ✓ Unemployment Income.
- ✓ Self Employed Health Insurance Premiums.
- ✓ This only serves as a guideline and in no way reflects all deductions available to the taxpayer. If you have questions or concerns you need to call or make an appointment with one of our tax professionals.



We're on the web! Check Us Out.
www.doreencreel.com

Small Business Checklist

Quality Work,
Reasonable
Prices

- *Gross receipts or sales.
- *Other Income.
- *Cost of goods sold.
 - Beginning inventory
 - Purchases
 - Cost of Labor
 - Materials & Supplies
 - Other Costs.
 - Ending inventory
- *Advertising
- *Bad Debt
- *Mileage or Actual Auto Expenses
- *Commissions or Fees
- *Freight / Shipping
- *Insurance
- *Mortgage Interest
- *Other Interest
- *Legal & Professional Fees
- *Office Expense
- *Rent Expense
- *Equipment Rentals
- *Repairs & Maintenance
- *Supplies
- *Taxes & License
- *Travel
- *Meals & Entertainment
- *Utilities & Telephones
- *Wages & Salaries
- *Other Business Ex-

penses. List type and amount.

Home Office Use

- *Area used Exclusively for business.
- *Total area of home.
 - Mortgage interest
 - Real Estate Tax
 - Utilities
 - Insurance
 - Repairs, Maintenance.
 - Rent
 - Security
 - Other. List type and amounts

