

MARTIN TAX & FINANCIAL SERVICES

WHAT SHOULD I BRING?

- New Client? Copy of last year return
- Estimated tax payments, if any
- Wage and Tax Statements (W-2)
- Interest Income (1099-INT)
- Foreign Bank Account Info. If Any.
- Dividend Income (1099-DIV)
- Any 1095-A forms for Marketplace Insurance
- Any 1095-B or 1095-C forms for proof of Health Insurance
- Pension Income (1099-R)
- Unemployment Compensation (1099-G)
- Social Security Benefits (SSA-1099)
- Distributions from Profit Sharing, 401(k), IRA's, etc. (1099-R)
- Alimony income/expense
- Railroad Retirement Benefits (RRTA-1099)
- Commissions/Independent Contractor/Self-Employment income (call for an additional worksheet)
- Change of job moving expenses
- Rental property income and expenses
- Income from Partnerships, Estates, Trusts, S-Corps, etc. (K-1)
- Did you sell any securities: stocks/mutual funds
 - You will need:
 - 1099-B Proceeds from Broker Exchange Transactions
 - Records of date of purchase and original cost
- Did you sell your home?
 - You may need:
 - 1099-S Proceeds from Real Estate Transactions
 - Closing statement from purchase of home
 - Closing statement from sale of home
 - Records of any improvements
- What is your date of birth and SSN? Spouse DOB & SSN?
- Dependents Social Security Numbers and dates of birth
- IRA/SEP/KEOGH contributions or rollovers
- Gambling/Lottery winnings (W2-G)
- Child care expenses that enable you to work- Name, address, SSN or FIN, and amount paid to each daycare provider
- Did you get married or divorced during the year?
- Jury pay, prizes & awards
- Did you sell or trade in any business assets e.g. car, computer, rental property?
 - You will need:
 - Records of date of purchase and the original cost
 - Records of prior depreciation
 - Any settlement statements
- Do you make payments on a student loan?
- Do you pay any higher education expenses for yourself, your spouse, your dependents
- Any other income from any other source!

To Itemize Your Deductions, we will need:

- Amount paid for health insurance **only if not paid through a pre-tax payroll deduction**
- Out of pocket medical expenses including dental, vision, co-pays, & Rx (must exceed 7.5% of your income in order to decrease taxes)
- Home mortgage interest (1098)
- Real Estate/Property Tax receipts
- Personal Property Tax Receipts-car, boats, trailers, etc. PAID in tax year
- Charitable contributions
- Employee Business & Miscellaneous Expenses (must exceed 2% of your income in order to decrease taxes)

Miscellaneous:

- Safety deposit box fees
- Tax preparation fees
- Gambling losses (only to the extent of winnings claimed)
- IRA fees/investment expenses

Business Expenses:

- Travel/Transportation (call for auto worksheet)
- Meals/Entertainment
- Lodging
- Job related tools, supplies, dues, subscriptions, licenses, permits, etc.
- Gifts
- Job related education expenses
- Job seeking expenses
- Union Dues
- Safety clothes/uniforms
- Uniform cleaning expense
- Business pager

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