

WHAT DO I BRING TO MY INCOME TAX APPOINTMENT?

- Social Security Card(s) – (NEW clients only)**
- Driver's License(s) - (ALL clients)**
- Date of Birth (Taxpayers & Dependents)**
- Copy of Last Year's Federal and State Tax Returns (NEW clients only)**

INCOME DOCUMENTS (most commonly used)

- Form W-2s (Wage Statements)**
 - Bring all of your current year Forms W-2 and Forms 1099-MISC, if you are an independent contractor
- Form 1099-INT (Interest Income)**
 - If you have earned interest of \$10 or more (ex. Bank accounts, CDs, money market accts, etc.)
- Form 1099-MISC (Miscellaneous Income)**
 - If you received rental income, royalties, prizes/awards, other income, etc.)
- Form 1099-NEC (Nonemployee Compensation)**
 - If you received self-employed income, independent contractors, freelancers, etc.
- Form 1099-DIV (Dividend Income)**
 - If you have earned dividend income from investments (ex. stocks, mutual funds, etc)
- Form 1099-R (Retirement Income/Pension/Annuity Distributions)**
 - Distributions of \$10 or more
- Form 1099-G (Unemployment Income)**
 - If you received unemployment compensation
- Form SSA-1099 (Social Security Income)**
 - If you received Social Security Benefits (not for those receiving SSI)
- Form 1099-B (Capital Gains/Loss)**
 - If you sold any assets for more than you originally paid for it (ex. Stocks, bonds, real estate, furniture, vehicles, etc.); Tax based on filing status & capital gain amount
 - Please note that certain types of assets are not deductible

DEDUCTIONS (most common)

- Medical Expenses**
 - Medical, dental, vision medical expenses for the year are greater than 7.5% of your adjusted gross income (to include co-pays, deductibles, prescriptions, mileage to medical visits, etc.)
- Home Mortgage Interest and Personal Property Taxes Paid** – Also includes Vehicle Registration Ad Valorem taxes paid
- State Income Tax Refund Amount** - Form 1099-G if you received a state or local income tax refund or credit during the year
- Interest Paid (Mortgage or Home Equity Loan)**- Form 1098
- Gifts/Charitable Donations, Cash and Noncash** - Charitable contributions are deductible only if you itemize deductions. (Ex. Goodwill, Salvation Army, Church, other Nonprofit donations with documentation)
- Casualty or Theft Losses** - to deduct part or all of a loss due to theft or casualty, such as vandalism, a fire, or a storm, if the total amount of losses during the year is greater than insurance reimbursements, \$100, and 10% of your adjusted gross income
- Alimony Paid or Received** - Child support payments are not included
- Other Deductions**
 - (Student loan interest, Work-related educational expenses, Teacher expenses, Moving expenses, gambling losses, sales tax, personal property tax, etc.)

CREDITS (most common)

- Child/Dependent Care Credit**
 - Expenses care for children under 13 (Includes Provider EIN, Address) (**Cannot claim credit if Married filing separately)
- Education Credit**
 - Form 1098-T; If you are a student, or if you have a dependent who is a student under 24 enrolled at least half time (**Cannot claim credit if Married filing separately)
- Retirement Savings Credit** - Contributions made to Traditional or Roth IRA, voluntary after-tax employee contributions made to a qualified retirement plan (including the federal Thrift Savings Plan) or 403(b) plan (**Please note there are AGI limitations based on filing status)
- Other Credits**
 - **Residential Energy Credits**
 - **First-Time Homebuyer Credit**
 - **Electric Vehicle Credit**
 - **Healthcare Credit (Premium Tax Credit)** helps eligible individuals and families cover the premiums for their health insurance purchased through the Health Insurance Marketplace

OTHER/MISCELLANEOUS INFORMATION

- Income and Expenses from Rentals**
- Record of Purchase or Sale of Residence** –
 - Bring this form and a copy of your settlement papers for the new house, including Form HUD-1, *Settlement Statement*
- Lottery or Gambling Winnings** - gambling winnings of \$600 or more, the payer should send you a Form W-2G, *Certain Gambling Winnings*.
- Unreimbursed Employment-Related Expenses** - the cost of uniforms, protective clothing, fees to employment agencies, and dues to professional organizations **(NO LONGER DEDUCTIBLE unless Armed Forces reservist, performing arts, state/gov. official, employee with impairment-related work expenses)**
- Job-Related Educational Expenses** - courses are necessary to maintain your job skills but do not qualify you for a new job
- Student Loan Interest** - Form 1098-E, *Student Loan Interest Statement*
- Moving Expenses** - The costs of renting a moving van, hiring movers, and the cost of gas or the standard mileage rate are examples **(NO LONGER DEDUCTIBLE unless Active Duty Armed forces members w/ military orders)**

****Please note that there are tons of other forms, but we tried to pull the most common type of forms that are utilized most. If you have questions about any other deductions, credits, expenses please do not hesitate to reach out to us.**

****If you have a home-based business or small business, we have resources on our website to help you get organized for tax season.**



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