



TACSS

Taxes. Bookkeeping. Payroll.

402-819-4711

**** For new clients please provide previous year's tax return**

Personal Information

Your social security number or tax ID number

Your spouse's full name and social security number or tax ID number

Dependent(s) Information

Dates of birth and social security numbers or tax ID numbers

Childcare records (including the provider's tax ID number) if applicable

Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Sources Of Income

Employed

Forms W-2

Unemployed

Unemployment, state tax refund (1099-G)

Self-Employed

Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Rental Income

Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Record of estimated tax payments made (Form 1040-ES)

Retirement Income

Pension/IRA/annuity income (1099-R)

Social security/RRB income (1099-SSA, RRB-1099)

Savings & Investments or Dividends

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold
(if basis is not reported on 1099-B)

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

Other Income & Losses

Gambling income (W-2G or records showing income, as well as expense records)
Jury duty income
Prizes and awards
Trusts
Royalty Income 1099–Misc.
Any other 1099s received
Record of alimony paid/received with ex-spouse's name and SSN

Types Of Deductions

Home Ownership

Forms 1098 or other mortgage interest statements
Real estate and personal property tax payments
Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
All other 1098 series forms

Charitable Donations

Cash amounts donated to houses of worship, schools, other charitable organizations
Records of non-cash charitable donations
Amounts of miles driven for charitable or medical purposes

Medical Expenses

Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
Form 1095-B and/or 1095-C if you had insurance coverage through any other source
(e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)

Childcare Expenses

Fees paid to a licensed day care center or family day care for care of an infant or preschooler
Wages paid to a baby-sitter
Don't include expenses paid through a flexible spending account at work

Educational Expenses

Forms 1098-T from educational institutions
Receipts that itemize qualified educational expenses
Records of any scholarships or fellowships you received
Form 1098-E if you paid student loan interest

K-12 Educator Expenses

Receipts for classroom expenses (for educators in grades K-12)

State & Local Taxes

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
Invoice showing amount of vehicle sales tax paid

Retirement & Other Savings

Form 5498-SA showing HSA contributions

Form 5498 showing IRA contributions

All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

City/county you lived/worked/had property in

Records to support property losses (appraisal, clean up costs, etc.)

Records of rebuilding/repair costs

Insurance reimbursements/claims to be paid

FEMA assistance information

Check FEMA site to see if my county has been declared a federal disaster area