

# Van Meter Tax Service

536 E. Main Street, Little Falls, NY 13365

59 W. Grand Street, Palatine Bridge, NY 13428

Phone: (315) 823-9200 or (518) 673-0002



## Basic Checklist of Items to Bring:

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- Names, Dates of Birth and Social Security numbers for you, your spouse and all your dependents.
- Name, address and SSAN of anybody you PAY if you can claim the cost as a credit or deduction: Alimony to ex-spouse, Child-Care Provider, etc.
- Bring last year's Federal and State tax returns if at all possible.
- If anything came in an envelope that said "Important Tax Information," then bring it!
- If you own a home, bring your Form 1098 or other records of mortgage interest and real estate taxes.
- If you or your children are in college or if you are paying off student loans, bring in the Form 1098-T or other records.
- If you bought a new home or a new car this year, we may be able to get you a deduction, so bring in all the records.
- If you think you may be able to itemize, be very thorough about digging-up the records of your medical, casualty, and job-related expenses, and your charitable deductions, tax-preparation costs, safe-deposit boxes, etc.
- A voided check, if you want to direct deposit any tax refund.
- If you own a business, are self-employed, own rental properties, adopted a child, or hire household help, **call us!**

## Complete Check-List of Items to Bring:

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*You can look over this list for good hints on items that will HELP us to MINIMIZE the taxes you pay.*

### Income Records:

- W-2 forms from all your employers
- Schedule K-1s from Partnerships or S-Corps
- Did you receive interest or dividends? Bring the 1099-INT or 1099-DIV
- Did you sell any securities? Bring the form 1099-B, and records of your cost (confirms, etc)
- Did you pay taxes on foreign investment income? Bring broker age statements
- Did you exercise/sell stock options or ESOP shares? Bring 1099-B and all cost records
- Did you get a state tax refund? Bring the 1099-G
- Did you get unemployment income? Bring the 1099-G and any other records
- Did you get Social Security Benefits? Bring your Form SSA-1099
- Did you get Jury Duty pay? Bring a record of what you received
- Did you win money or property gambling? Bring records of what you won, and any offsetting losses
- Did you win any prizes? Bring records and any Form 1099-MISC
- Did you receive any Royalties? Bring the 1099 or any other record

### IRA and Pension Distributions:

- Did you receive any Pension or IRA distributions? Bring your 1099-R
- Bring any account summary or statement
- If you have ever filed a form 8606 on this IRA (for non-deductible contributions), bring the most recent copy

### Alimony:

- Did you receive Alimony? Bring a record of the amount and date of divorce
- Did you pay Alimony? Bring the name and SSAN of the recipient, and the date of divorce

### Interest and Tax Expenses:

- Bring records of any quarterly income tax payments or tax prepayments
- Did you pay mortgage interest on your home? Bring the Form 1098 or your mortgage statement
- Form 1098 if you paid any points this year when buying a home
- Did you pay margin interest? Bring your brokerage statements
- Did you pay property taxes? Bring the Form 1098 or other records

- Did you borrow money to fund investments? Bring records of principal and interest payments
- Did you owe money OR get a refund on last year's State taxes? Bring your State tax return

#### **IRA & Retirement Account Contributions:**

- Did you contribute to an IRA this year? Bring records, confirmations or brokerage statements
- Records of contributions to self-employed retirement plans

#### **Child Care:**

- What you spent on child care
- Name and address of Child Care Provider
- Provider's Tax ID or Social Security number (required by IRS)

#### **Education Costs:**

- Records of tuition for post-secondary education
- If you paid tuition, bring any Form 1098-T
- If you are paying interest on a student loan, bring the Form 1098-E or any records

#### **Medical Costs:**

- Records of any contributions to a Health Savings Account
- Records of payments for self-employed health insurance
- If you feel you MAY HAVE spent over 7.5% of your AGI on medical expenses, bring records of expenses, to include doctor and dentist bills, travel expenses, eye-glasses expenses, etc.
- Form SSA-1099 for Medicare costs paid out of your Social Security benefits
- Records of health insurance policies and premiums

#### **Charitable Giving:**

- Did you give money to church or charity? Bring cancelled checks and receipts
- Did you donate property? Bring receipts and any appraisals you were given
- Bring records of any appraisal fees you paid
- Pay records for charitable donations deducted from your pay

- Last year's tax return if you had a charitable deduction carry-forward

#### **Accident, Casualty and Theft Losses:**

- Descriptions of any damaged or stolen property
- Records proving the cost of the property
- Records of any appraisal fees you paid
- Records of any insurance payments or reimbursements

#### **Work Expenses:**

- Are you an educator? Records of materials & supplies you bought for the classroom
- Note:** *The following expenses may apply only to the New York State Return*
- Records of union dues
- Records of gifts to clients
- Records of tools, supplies or equipment you bought because you needed them for work
- Records of the cost and cleaning of uniforms or special clothing for work
- Records of the cost of seminars, professional publications and books for work
- Records of travel and entertainment related to work (hotels, dining, tolls, parking, etc.)
- Mileage logs of travel from work to other job sites
- Any job search expenses
- Records of the cost of education related to your current job (tuition, fees, books, transportation, lodging)

#### **Various Expenses:**

- Note:** *The following expenses may apply only to the New York State Return*
- Records of tax preparation fees, to include books or software
- Safe deposit box fees
- Custodial fees for your IRA or other retirement plan
- Fees you paid for investment advice

#### **Moving Expenses:**

- Note:** *May apply only to military personnel or to the New York State Return*
- Old and new addresses
- All records of costs, such as movers, transportation, mileage, hotels and meals
- Records of any company reimbursement