



Essentials to Have Ready for Your 2015 Tax Return Preparation

As you gather your papers and other tax information, here is a list of important items to have ready that allows Associated Tax to prepare your 2015 tax return most accurately and to your best advantage.

Identification and Bank Information:

- Current picture ID (required if fees are to be paid from the refund)
- Proof of social security number (new clients)
- Social Security cards for any new dependents
- Routing & Account Numbers for direct deposit (use check not deposit slip)

Income Statements:

- W-2's from each place you were employed in 2015
- W-2 G's from any gambling winnings
- All 1099's including (but not limited to)
 - (1099 INT/1099 DIV) Interest/Dividends earned from banks and other investments
 - (1099 Misc) Self Employment Income
 - (1099 Misc) Rental Income
 - (1099-R) Pension, Annuity, Retirement plan distributions
 - (1099-G) Unemployment/State Tax Refund
 - (1099-B) Broker Statements (ex: sale of stocks, stock options, etc)
 - (1099-C) Cancellation of Debt (forgiveness of debt)
 - (SSA-1099) Social Security Benefits
 - (1099-SA) HSA Distribution

Contract Labor and Self-Employment Information:

Add all income earned from self-employment or contract labor

- Separate and total all expenses incurred as a result of your self-employment income such as supplies, tools, materials, business vs personal miles driven, car expenses, etc.
- Checklist for day care providers now located on our website. Look for "Daycare Provider Checklist" under *Articles*.

Itemized Deductions:

- Medical, dental or eye care expenses including after-tax insurance premiums
- Real Estate Taxes
- Personal Property Taxes (boats, cars, trailers, etc) (MTR VEH TAX on pink slip)
- Sales Tax paid on vehicles, motorcycles, RV's, planes & boats
- Home Mortgage Interest (Form 1098) from each mortgage if more than one
- Cash charitable contributions (Church, Salvation Army, United Way, etc)
- Non cash charitable contributions (clothing, furniture, etc)

Education Expenses:

- (1098-T) Tuition, deductible expenses for education
- (1098-E) Student Loan interest

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Child Care Expenses:

- Provider name, address, EIN or social security number
- Amount paid for each child

Affordable Care Act:

- (1095-A) if insurance purchased through the marketplace
- (1095-B) if insurance purchased through your employer (you may or may not receive this for 2015)

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you. Associated Tax has been in business of preparing tax return for over 42 years now! We look forward to hearing from you soon.

Contact either of our two Associated Tax Omaha locations

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