



Essentials to Have Ready for Your 2017 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 2017 tax return most accurately and to your best advantage.

Identification and Bank Information:

- Current picture ID (required by all states this year)
- Proof of social security number (new clients and those seeking Fast Cash Advance)
- Social Security cards for any new dependents
- Routing and account numbers for direct deposit (use check not deposit slip)

Income Statements:

- W-2's from each place you were employed in 2017
- 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) (Motor Vehicle Tax on pink slip)
- Sales Tax paid on vehicles, motorcycles, RV's, planes and 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 (You must wait for this form)
- (1095-B or 1095-C) if insurance purchased through your employer (you may or may not receive this form for 2017)

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 43 years now! We look forward to hearing from you soon.

Contact either of our two Associated Tax Omaha locations

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Also get more information on our website [**associatedtaxomaha.com**](http://associatedtaxomaha.com)