

## ACCOUNTING & BUSINESS ENTERPRISES, LLC

### List of Tax Preparation Forms, Documents

#### Taxable Income Forms, Documents

- \_\_\_ W-2 Form(s) for Wages, Salaries, and Tips
- \_\_\_ Interest Income Statements: Form 1099-INT & 1099-OID
- \_\_\_ Dividend Income Statements: Form 1099-DIV
- \_\_\_ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- \_\_\_ Sales of Real Estate: Form 1099-S
- \_\_\_ State Tax Refunds: Form 1099-G
- \_\_\_ Alimony Received or Paid
- \_\_\_ Unemployment Compensation Received
- \_\_\_ Miscellaneous Income: Form 1099-MISC
- \_\_\_ Retirement Income: Form 1099-R
- \_\_\_ Social Security Income and Railroad Retirement Income: Form SSA-1099
- \_\_\_ Business Income and Expenses
- \_\_\_ Rental Income and Expenses
- \_\_\_ Farm Income and Expenses
- \_\_\_ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- \_\_\_ Tax Deductible Miles Traveled for Business Purposes

**Tax Credits**

- Child Tax Credit
- Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- Earned Income Tax Credit (EITC)
- Adoption Expense Information for the Adoption Credit
- Foreign Taxes paid
- First Time Home Buyer Tax Credit

**Tax Deductions, Expenses**

- Medical Expenses for the Family
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Tax Deductible Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- Personal Property Taxes Paid

- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Tax Deductible Mileage for Volunteer Purposes
- Casualty and Theft Losses
- Amount Paid to Professional Preparer Last Year
- Unreimbursed Expenses Related to Your Job
- Miles Traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Return Preparation Fee

### **Tax Estimate Payments**

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid

### **General Information**

- \_\_\_ Copy of Last Year's Tax Return
- \_\_\_ Social Security Numbers for You and Your Spouse
- \_\_\_ Educational Expenses for You and Your Spouse
- \_\_\_ Dependents' Names, Years of Birth, and Social Security Numbers
- \_\_\_ Dependents' Post High School Educational Expenses
- \_\_\_ Child Care Expenses for Each Dependent
- \_\_\_ Prior Year Adjusted Gross Income (AGI) - how to find last year's adjusted gross income (AGI)
- \_\_\_ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- \_\_\_ Bank Account Number (BAN) (For direct deposit/debit purposes)

Need an appointment? Go to <https://aandbentllc.com> and click "Book Today" or

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