Amy Vance Tax Service LLC
amy@vancetaxservice.com
712.256.2611

TAX DOCS NEEDED TO PREPARE YOUR RETURNS

CLIENT NAME: ____

Please watch your mailbox for your tax docs end of Jan thru Feb. Those with investment accounts may receive docs up thru March. We do not have access to look up tax docs and anything missing we are not aware so be on the lookout for your tax docs.

- ❍ W-2(s) ________ SELF ________SPOUSE
- ❍ Unemployment (FORM 1099G) if applicable
- ❍ Interest Income, Dividend Income, Reports from stock accounts
- ❍ Mortgage interest/property tax statements (FORM 1098)
- ❍ 1099's - (R-retirement cashout/distributions, INT-interest income, DIV-dividends, MISC-miscellaneous, G-government/unemployment, SSA-social security statement, B-stock sales (need cost basis)
- ❍ HSA - Health savings accounts – if you took a distribution for medical, need your 1099SA
- ❍ K1's - from S Corporations, Partnerships, Trusts & Estates
- ❍ W-2G - gambling income
- ❍ Additional dependents (if new from previous year)

  Name____________________________ DOB________________ SSN_______________

  Name____________________________ DOB________________ SSN_______________

  Name____________________________ DOB________________ SSN_______________
- ❍ College Tuition (FORM 1098-T), if using 529 plan need form 1099Q, books & supplies total
- ❍ Childcare information – (daycare statement if you have)

  Name of Caregiver _________________________ SSN/EIN______________________

  Address____________________________________ Total paid___________________
- ❍ Marketplace insurance/Obamacare (FORM 1095-A)
- ❍ Energy Efficient Home Improvements - provide receipt and we can see if any credit applies
- ❍ Electric Vehicle - provide bill of sale and we can see if any credit applies

ADDITIONAL IF APPLICABLE:

- ❍ Donation receipts
- ❍ Medical insurance paid (out of pocket), if you used HSA to pay do not include amounts paid with HSA
- ❍ Medical bills, prescriptions -TOTAL AMOUNT will need to exceed 10% of income
- ❍ Long Term Care Insurance
- ❍ Medical Miles, if medical exceeds 10% of income
- ❍ License Plate Fees (can be found on your vehicle registration)
- ❍ Traditional IRA contributions
- ❍ ROTH IRA contributions

SELF EMPLOYMENT

**If you have self-employment income/expenses to report you will be asked to fill out a Biz Tax Organizer. You can obtain this from our website at vancetaxservice.com or you can request via email amy@vancetaxservice.com. Do not turn in receipts to us, you need to add up your own receipts or you will be charged bookkeeping fees at our hourly rate.

RENTAL INCOME

**If you have rental income/expenses to report you will be asked to fill out a Rental Tax Organizer. You can obtain this from our website at vancetaxservice.com or you can request via email amy@vancetaxservice.com. Do not turn in receipts to us, you need to add up your own receipts or you will be charged bookkeeping fees at our hourly rate.