



3015 N 90th Street, Ste 7
Omaha, NE 68134-4713
Phone: 402-415-0334
Fax: 402-884-8829
www.jamccoypca.com

Essentials to have ready for your Tax Return Preparation

As you gather your papers and other tax information, here is a list of important items to have ready that allows *JA McCoy CPA, PC* to prepare your current year tax return most accurately and to the best advantage. Be aware additional information may be requested once we have reviewed your tax documents.

Identification and Bank information:

- Current Photo ID – (Only if a new client)
- Proof of social security number for all new clients
- Birth Certificate for any new dependent (if not previously provided)
- Bank routing & account number for direct deposit. Please provide us with a copy of the check, not deposit slip

Income Statements:

- W-2's from each place you were employed in the current tax year
- W-2G'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 daycare providers is available upon request

Itemized Deductions:

Bring any of these in – if you feel you may be able to itemize

- 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 & 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, as well as the payment history transcript from the school
- (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)

Estimated tax payments:

- Records of any federal or state individual estimated tax payments made for the year

Prior year tax return:

- (for New clients only)

If your return involves: the Earned Income Credit, Child Tax Credit, American Opportunity Credit or your filing status is head of household, you are now required to submit one of the following documents per qualifying child:

Residency of a Qualifying Child:

- School records or statement
- Birth certificate
- Landlord or property management statement
- Health care provider statement
- Medical records
- Childcare provider records
- Placement agency statement
- Social Service records or statement
- Place of worship statement
- Indian Tribal Official statement
- Employer statement
- Payment history transcript from the higher education school (for the American Opportunity Credit)

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you.