

PS IT'S TAX TIME
609 Henriette Ave
Crivitz, WI 54114
920-434-5211

I am so happy that you have chosen me as your tax preparer. The following is a check list for you to verify you have all the documents needed for the appointment.

First it is best if you have the **prior year tax return**, this gives me any carryover information and some other items. Do not print the 100 pages if you filed with Turbo Tax or some other software but download the file so I can look at it on your phone or device. If you cannot bring it, we can still do it for the current year, but if you have it please bring it along. **You need to have the names, birth dates and social security numbers for everyone on the return.** The socials are usually on the prior year return, but birthdates are not so please be ready to provide them.

All income sources:

W2's be sure to think back over the year if you worked more than one place

1099's These could be interest earned, dividends received, stock sales, miscellaneous income from benefits or other income, social security received, unemployment 1099G (must access on the unemployment website-they do not mail these) IRA distributions, alimony received, any income from your own business and so on! All income you have for the year.

The following forms: Continuing education expenses this would be 1098T, contributions to any IRA separate from the deductions through your employer. Student loan interest paid for the year-I do not need the form just the total interest paid for the year.

IF YOU OWN HOME: Property taxes paid for the year, 1098 Interest income for your mortgage, including second or line of credit with the house as collateral, residential energy improvements such as new windows, doors, insulation, furnace/air conditioning. (must meet energy star status)

CHARITABLE GIVING: both cash and non-cash listed separately. Although with the new tax laws itemized deductions are not always used, I still need to know these numbers for the Wisconsin credit.

IF YOU RENT: If you make **under** \$24,680 you may qualify for Wisconsin homestead credit. If you do, you need to have a **rent certificate filled out and signed by the landlord**. Call ahead if needed and we can mail one if your landlord does not have one. If you earn more than \$24,680, you still qualify for a rent credit, but you only need to total the amount of rent paid during the year and do not need a rent certificate.

Health savings account withdrawal information (the amount contributed to your HSA appears on the W2) but if you used the account for medical expense, you would need to obtain the distribution amount. You would obtain that by going to your online account or calling the financial institution.

Most people do not need to itemize any medical expense, the rule is that you have to exceed 7.5% of your adjusted gross income to deduct the amount above that on the Schedule A, and so if you have a **tremendous** amount of out of pocket medical is the only time you would need to itemize that.

If you have children, we need childcare costs- **you need to have the provider give you a statement with the ID number. College expenses** if you have a child in college, or you are attending college, you need the **1098T** for the tuition paid and additional expenses paid for books/materials needed for the classes that were required by the school. You cannot use the cost of room & board, meals, or supplies including computers unless they are required by school.

If you had **health insurance** through **the Marketplace**, **you would need to have 1095A** from the Marketplace.

Lastly, I do not accept any credit or debit cards. Payment is due at the time of preparation and must be **cash or check**.

Please do not feel overwhelmed, that was the hard part, from here I take care of the rest so you can sit back and relax! I look forward to seeing you soon.

Sincerely and with blessings,

Peggy Sue Mason