

MCCOY'S ACCOUNTING AND TAX SERVICES, INC.

Minimum Tax Liability, Maximum Tax Benefits

Tax Documentation Checklist

The following is a general checklist and all items may not apply to everyone. Whether you have an appointment or send your information to us, the following is needed.

- Taxpayer (and spouse) name, address, birthdate, address, Social Security Number, occupation
- For U.S. Citizens abroad – Complete address to include county/province and or APO address
- Dependents names, social security numbers, dates of birth
- All W-2 and W-2G forms for the year
- All 1099 forms received, including (but not limited to) 1099 R, 1099 MISC, 1099 DIV, and 1099-INT, etc.
- State tax refund amount received from previous year.
- If you sold stock in the previous year, please contact us.
- All unemployment income
- Social Security form SSA-1099
- Alimony received or paid (if paid, the social security number to whom paid)
- Money put into an IRA and a statement showing the fair market value
- If you purchased or sold a house this past year, provide date of purchase and sale, purchase price and selling price and settlement documentation.
- Form 1098 Mortgage Interest Statement. This form may include property taxes paid.

For the following we need only the totals and not the actual receipts:

- Medical expenses: prescriptions, dentists, nurses, health insurance, Physicians Mutual, hearing aids, dentures, eyeglasses, etc. _____
- Real estate taxes paid _____
- Excise taxes paid on cars, trucks, boats, and campers _____
- Contributions:
 - Cash and checks _____
 - Other than cash and checks (include receipts such as Goodwill) What type of items did you donate? _____
- Dependent childcare expenses: amount paid name, address, and ID number of caretaker(s) or daycare center (social security number or federal ID number)

- If you made estimated tax payments, please provide us with the amounts and the dates they were made. _____
- If you have long term health care insurance we need to see a copy of your policy, some of the premium may be deductible.

If you have children in college or if you are attending college you may be eligible for one of the Education Credits.

- Please provide the Form 1098T-Tuition Payments form.
- Is the student degree seeking? _____
- What year is the student in college? _____
- Expense amounts for books, supplies and equipment. Room, board and transportation are not deductible.