



# TACSS

*Taxes. Bookkeeping. Payroll.*

**402-819-4711**

**\*\* For new clients please provide previous year's tax return**

## **Personal Information**

Your social security number or tax ID number

Your spouse's full name and social security number or tax ID number

## **Dependent(s) Information**

Dates of birth and social security numbers or tax ID numbers

Childcare records (including the provider's tax ID number) if applicable

Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

## **Sources Of Income**

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### **Employed**

Forms W-2

### **Unemployed**

Unemployment, state tax refund (1099-G)

### **Self-Employed**

Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

### **Rental Income**

Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Record of estimated tax payments made (Form 1040-ES)

### **Retirement Income**

Pension/IRA/annuity income (1099-R)

Social security/RRB income (1099-SSA, RRB-1099)

### **Savings & Investments or Dividends**

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold  
(if basis is not reported on 1099-B)

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

## **Other Income & Losses**

Gambling income (W-2G or records showing income, as well as expense records)  
Jury duty income  
Prizes and awards  
Trusts  
Royalty Income 1099–Misc.  
Any other 1099s received  
Record of alimony paid/received with ex-spouse's name and SSN

## **Types Of Deductions**

### **Home Ownership**

Forms 1098 or other mortgage interest statements  
Real estate and personal property tax payments  
Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)  
All other 1098 series forms

### **Charitable Donations**

Cash amounts donated to houses of worship, schools, other charitable organizations  
Records of non-cash charitable donations  
Amounts of miles driven for charitable or medical purposes

### **Medical Expenses**

Amounts paid for healthcare insurance and to doctors, dentists, hospitals

### **Health Insurance**

Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)  
Form 1095-B and/or 1095-C if you had insurance coverage through any other source  
(e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)  
Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

### **Childcare Expenses**

Fees paid to a licensed day care center or family day care for care of an infant or preschooler  
Wages paid to a baby-sitter  
Don't include expenses paid through a flexible spending account at work

### **Educational Expenses**

Forms 1098-T from educational institutions  
Receipts that itemize qualified educational expenses  
Records of any scholarships or fellowships you received  
Form 1098-E if you paid student loan interest

### **K-12 Educator Expenses**

Receipts for classroom expenses (for educators in grades K-12)

### **State & Local Taxes**

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid  
Invoice showing amount of vehicle sales tax paid

**Retirement & Other Savings**

Form 5498-SA showing HSA contributions

Form 5498 showing IRA contributions

All other 5498 series forms (5498-QA, 5498-ESA)

**Federally Declared Disaster**

City/county you lived/worked/had property in

Records to support property losses (appraisal, clean up costs, etc.)

Records of rebuilding/repair costs

Insurance reimbursements/claims to be paid

FEMA assistance information

Check FEMA site to see if my county has been declared a federal disaster area