

Deductions & Credits – Items to Bring

Be sure to bring us the following documents for these related credits/deductions.

Also, don't forget the basics:

1. Driver's License, Passport or Identification (expired documents will not be accepted)
2. Social Security Cards for dependents and filers (certified copies only)
3. 2014 Tax Returns (all pages)
4. Last paystub or W-2 for 2015

Important Tax documents

- Mortgage Interest Statements (1098)
- Student Loan Interest (1098-E)
- Child Care Fee Statements
- Social Security Benefit Statements (1099R)
- Veterans Benefit Statement
- Unemployment Compensation/State Tax

Medical Expenses

- Insurance (out of pocket: co-payments)
- Medical Transportation
- Dental expenses
- Prescriptions
- Mileage to Medical Care

Donations

- Clothing, Furniture, Food etc.
- Tithes (Cash, Check or Debit)
- Vehicle Registration(s)

Self-Employment/Business Deductions

- Advertisements
- Mileage
- Marketing Supplies
- Banking fees/Legal Fees
- Insurance
- Rent/Leasing Space/Utilities

Misc. Deductions

- Safe Deposit Box
- Faxing Charges
- Continuing Education
- Uniforms/Protective Gear
- Educational Expenses (Tuition, Testing fees, Books, etc.)
- Tools required for work
- Cars/Boat Tags
- Union Dues
- Professional Association Fees
- Uniform Maintenance
- Income Tax Preparation
- Mortgage Interest & Points
- Investment & Broker Fees

Moving Expenses (more than fifty miles)

- Date of Move
- Truck Rental
- Packing Materials
- Hotels
- Storage

Rental Property

- Lease Preparations
- Homeowners Association Fees
- Date of Purchase
- Date Sold
- Closing Fees
- Date Rented
- Advertising
- Cleaning Service/Supplies
- Deposits
- Filing Fees
- Fire Extinguishers
- Floors
- Installation Fees
- Investment Counseling Costs
- Lawn Maintenance
- Painting
- Office Rent
- Roof
- Sanitation
- Rent Collection Costs
- Pest Control
- Rent Received

Home Office

- Monthly fees
- Mortgage Payments
- Date of Business Use Began
- Repairs to Office Space
- Security System Service
- Repairs to Home
- Home Owners Insurance
- Monthly Rent
- Utilities
- Water/Sewer
- Decorating/ Painting/ Plants