

PLEASE BRING THE FOLLOWING INFORMATION TO YOUR TAX APPOINTMENT:

ALL TAXPAYERS

Please note, not all taxpayers will have all of the documents listed below. Please bring 100% of those items that you do have and cross out those items that do not relate to your 2013 tax situation. Thanks!

- ✓ Full name, correct Social Security number and date of birth
- ✓ Current address, phone number, and email address
- ✓ Marital status as of 12/31/2013 (and, is this the same as 12/31/2012?)
- ✓ **NEW CLIENTS:** please bring a copy of your 2012 tax returns (and 2011 if available)
- ✓ All Forms W-2 from your employers
- ✓ All 1099-INT forms from banks (to report bank interest)
- ✓ Information on foreign bank and other financial accounts, if applicable
- ✓ All 1099-DIV forms from investments (to report dividends)
- ✓ Forms K-1 from partnerships, corporations, and/or estates
- ✓ Capital gains/losses (1099-B and realized gains/losses statements, including basis)
- ✓ Real estate transactions - all closing/settlement/Final HUD statements, 1099-S
- ✓ Form 1099-G showing state refund from prior year
- ✓ IRA and pension income (also withdrawals from 401(k) etc) (1099-R)
- ✓ Social Security benefit income (Form 1099-SSA)
- ✓ Alimony and unemployment income (Form 1099-G)
- ✓ Long-term care (Form 1099-LTC)
- ✓ Cancellation of debt income (Form 1099-C)
- ✓ Gambling income (1099-Misc or W-2G, also, provide info on gambling expense)
- ✓ IRA contributions
- ✓ Tuition expenses reported on Form 1098-T
- ✓ Tuition plan contributions/withdrawals reported on Form 1099-Q
- ✓ Student loan interest reported on Form 1098-E
- ✓ Amounts, dates, and payees (IRS/FTB, etc) of all estimated (“quarterly”) tax payments

TAXPAYERS WITH CHILDREN/DEPENDENTS

- ✓ Dependents: full name(s) and correct Social Security number(s)
- ✓ Date of birth of each dependent
- ✓ Months spent living in your home
- ✓ Your expenses for childcare
- ✓ Childcare provider’s name, address and social security number or EIN

TAXPAYERS WHO ITEMIZE DEDUCTIONS

Most taxpayers begin to itemize deductions when they own a home and have mortgage interest and property taxes. If you think you might be in this group, please prepare the following items:

- ✓ Medical expenses if they are significant (to figure this out, add up your basic income items - W-2, 1099, and then multiply that number by 10% - if your medical expenses are greater than that number, you may be in a position to itemize them:
 - ✓ Insurance premiums
 - ✓ Doctors and dentists
 - ✓ Prescription medications
 - ✓ Hospitalizations
 - ✓ Prescribed holistic treatments such as chiropractic, acupuncture
 - ✓ Medical equipment
 - ✓ Number of miles driven for medical purposes
 - ✓ Property (real estate) taxes (not for rental property)
 - ✓ Personal property taxes (bring your DMV bill or your license plate and VIN numbers)
 - ✓ Home mortgage interest and points reported on Form 1098 (and bring the form too)
 - ✓ Other home mortgage interest and points (bring ID info of person who receives 1098)
 - ✓ Mortgage insurance premiums
 - ✓ Gifts of money to charity (cash, check, charge) that you can substantiate
 - ✓ Gifts of stuff to charity (in good condition, and if more than \$500 in value that you can substantiate your basis)
 - ✓ Direct expenses and mileage associated with volunteer work
 - ✓ Information on casualty or theft losses (including Ponzi scheme losses)
 - ✓ Unreimbursed expenses incurred as an employee - auto expenses, travel, meals, education, office, etc.
 - ✓ Tax preparation fees paid
 - ✓ Investment expenses, safe deposit box

TAXPAYERS WITH RENTAL PROPERTIES

- ✓ Address of rental property and property type
- ✓ Number of days used as rental
- ✓ Number of days used personally
- ✓ Rental income actually received in 2013
- ✓ Expenses related to rental:
 - Advertising
 - Auto/travel
 - Cleaning and maintenance
 - Commissions paid
 - Insurance
 - Legal/professional fees
 - Management fees
 - Mortgage interest
 - Repairs

- Supplies
- Property and rental unit taxes
- Utilities you pay
- Improvements
- For depreciation - basis information

TAXPAYERS WITH SELF EMPLOYMENT/CONSULTING INCOME

- ✓ Description of the type of business you do
- ✓ Accounting of your business activity:
- ✓ Gross receipts
- ✓ Returns/refunds
- ✓ Cost of goods sold
- ✓ Advertising
- ✓ Auto expenses
- ✓ Commissions and fees
- ✓ Contract labor
- ✓ Employee benefit programs
- ✓ Insurances by type
- ✓ Interest expenses by type
- ✓ Legal and professional services by type
- ✓ Office expenses
- ✓ Pension and profit sharing plans
- ✓ Rent or lease of office
- ✓ Rent or lease of vehicles, machinery, equipment
- ✓ Repairs or maintenance
- ✓ Supplies
- ✓ Taxes and licenses
- ✓ Travel (transportation, accommodation)
- ✓ Travel meals and entertainment
- ✓ Local business meals and entertainment
- ✓ Utilities on business property
- ✓ Wages
- ✓ Telephone expense (business portion, never a first line into your home)
- ✓ Dues and memberships/subscriptions
- ✓ Other itemized/categorized expenses

TAXPAYERS WITH SELF EMPLOYMENT/CONSULTING INCOME - AND A HOME OFFICE

- ✓ Total square footage of living space
- ✓ Square footage of space used “regularly and **exclusively** for your business
- ✓ Personal money used to pay rent, mortgage interest, property tax, insurance, utilities, repairs/maintenance, cleaning, and other indirect expenses

TAXPAYERS WHO CLAIM AUTOMOBILE EXPENSES

- ✓ Date your vehicle was placed in service
- ✓ Type of vehicle
- ✓ Total miles driven for entire year for all purposes
- ✓ Business-purpose miles
- ✓ Commuting miles
- ✓ Parking expenses
- ✓ If not using mileage rate ALL expenses of owning car for year

TAXPAYERS WHO HAVE ITEMS TO DEPRECIATE

- ✓ Date of acquisition of item
- ✓ Purpose of item
- ✓ Description of item
- ✓ Cost of item

OTHER GENERAL NOTES

- ✓ Not all taxpayers will have all of these items or issues on their tax return - so if it doesn't apply to you please don't worry about it
- ✓ If you have questions along the way please call (702) 769-7697 or send an email to support@lapochkintax.com
- ✓ Please bring everything to your appointment so that there is not lost time going back and forth trying to catch up with details that are missing