

TAX PREPARATION GUIDE For _____

(Please call 277-6222 to have a personalized checklist sent to you)

Please consider these items when gathering tax information (write pertinent results here or on back):

- Prior three years tax returns with all schedules and worksheets (unless prepared by us).
- Has any taxing agency notified you of an audit or adjustment to a prior year's tax return?
- Note any changes in occupation, phone/fax/E-mail, address, marital status, or the number in household.
- Social security numbers of all dependents (including parents and others) if we don't already have them.
- Did dependent children under age 24 have any Investment Income or Earned Income?
- Are you being claimed as a dependent on someone else's return?
- W-2's, 1099's, and K-1 Forms showing tax-reportable items. Please provide all originals.
- Breakdown and reporting statements of sources of interest or dividend income (including tax-exempt).
- All information for your business/rental ventures, corporations, partnerships, trusts, or LLCs.
- Health insurance coverage details or form 1095.
- Did you use a portion of your home as an office? Be ready to explain and have appropriate portions.
- Did you use your car for business? Submit bus. miles, commute miles, & pers. miles = all miles.
- Did you purchase, **convert** or **sell** your personal residence, other real property or any investments?
 - Copies of sales contracts and escrow papers relating to purchases or sales.
 - Determine a basis amount & date (usually the purchase price and date) for each item sold.
- Did you withdraw, contribute, or rollover funds to/from retirement? Was it an early withdrawal?
- Other statements or lists reporting income from any source (i.e.: state tax refunds, unemployment compensation, Social Security/RR retirement, tips, alimony, prizes, gambling, freelance work, etc.)
- Contributions to any retirement plan or IRA. Teaching expenses \$ _____
- Student loan interest. Alternative Fuel Vehicle Tuition, fees & course materials info.
- Adoption expenses. Health Savings Account info.
- Moving expenses, if job related and qualified Qualified expenses for Home Energy Credit
- Do you have household employees? Debt cancellation/forgiveness issues.
- Amount paid for dependent care provided while you and your spouse worked \$ _____
 - List of names, addresses, phone and identification numbers of dependent care providers.
- Did you or your spouse make a gift in excess of \$14,000 to any one person during the year?
- Do you want to contribute to any campaign funds or other contribution options on the tax forms?
- If refund is anticipated, supply banking info for direct deposit. (even split into IRA or Savings Bonds)
- Explain any anticipated large fluctuation in income, withholding or deductions for this next year?

Schedule of federal or state estimated tax payments or prepayments made:

FEDERAL - Prior year overpayment applied \$ _____

Prepay Date _____ Amount \$ _____

Prepay Date _____ Amount \$ _____

Prepay Date _____ Amount \$ _____

Prepay Date _____ Amount \$ _____

STATE - Prior year overpayment applied \$ _____

Prepay Date _____ Amount \$ _____

ITEMIZED DEDUCTIONS: NOTE: If the total deductions below are not over the standard deduction allowed (\$6,200 if single, \$12,400 if married filing jointly), don't worry about gathering the below information!

Medical & Dental Expenses (only if significant)

- Medicine, drugs and insulin
- Medical insurance premiums
- Travel, Doctors, Dentists, Etc.

Cash to Charity (must have receipt)

- House of worship
- Other miscellaneous charities

Taxes Paid

- State income taxes paid withheld
- Sales tax** on specific large purchases (optional)
- Real estate taxes**
- Tax on atv, boat, RV, etc. (NOT UT cars/trucks)

Gifts to Charity-Noncash (verified good condition)

- Deseret Industries, Salvation Army, etc
- Transportation/Miles/Other

Casualty/Theft Losses (only if significant)

Interest Paid

- Home mortgage to: Fin. Inst.
 - Individual (list name, addr, SS#)
- Bring settlement documents from refi.
- Other business/investment interest

Job Related Expenses and Misc. Deductions

- Employer Reimbursement (if any)
- Small tools or uniforms
- Tax preparation fees
- Investment expenses or safe deposit box
- Professional & union dues & publications

Updates / Changes:

Business status (get all organization papers and ID #'s)

Number in household additions/deletions

	Husband	Wife	Other
Occupation			
Home phone			
Cell phone			
Work phone			
E-mail			
Addresses			
Marital status			
Other:			

Questions or Comments to CPA:

Anticipated tax or financial changes:

Other financial concerns:

Budgeting
Investments
Retirement
Insurance
Education
Career
Other