

**FOR TAX YEAR 2014 ONLY!!!!!!**

Appointment:

ITEMS TO BRING	Y/N	ITEMIZED DEDUCTIONS	Y/N		Y/N
		<b>MEDICAL EXPENSES</b>		<b>MISCELLANEOUS</b>	
SSN Card for all persons listed on return		Hosp and Health Ins Prem (Include after-tax amounts paid or withheld at work)		Tax Fees & Advice	
Picture ID (Military, Driver Lic) and Birth dates		Long Term Care Insurance		Union Dues	
Last year's return		Vision / Dental Insurance		Safety Clothes, Shoes	
Bank account information (routing and account)		Medical, Eye, Dental out of pocket		Investment Advice	
W-2's		Prescriptions and Insulin		Investment Publications	
1099-C, Cancellation of Debt		Hospital, Lab, X-Ray, Testing		Safe Deposit Box	
1099-G, Unemployment or refunds		Lodging (not meals)		Computer for Invstmt. Use	
1099-MISC, self employment		Transport-Ambul., Air, Bus		<b>EMPLOYEE BUSINESS EXP</b>	
1099-R, retirement income		Medical Miles		Unreimbursed Job Search / Employee	
1099-S, Sale of property (home, etc)		<b>TAXES</b>		Meals	
1099-INT, Interest		State - Additional Pd Last Year		Lodging	
1099-DIV, stocks		State - Estimates Paid This Year		Travel-Plane, Taxi, Miles	
1099-B, stocks		Property Taxes on Main Home		Car Rental	
K-1, royalties		Property Taxes on Second Home		Convention Expenses	
SSA 1099, Social Security benefits		Property Taxes on Cars		Laundry, Misc.	
Alimony received		Foreign Taxes Paid		Work Tools	
Business income (small business - home)		Sales Tax on Vehicle, Boats, etc.		Educ. Exp. To Maintain Job	
Rental Property expenses		<b>INTEREST</b> *Provide Forms 1098		Uniforms	
Misc income, jury duty, gambling winnings		*Interest on Home Mortgage (1st & 2nd)		Transportation Workers	
1098-E, Student Loan Interest		Points Paid on Mortgage		Days -	
1098-T, Tuition paid		*Interest on Home Equity Loan		<b>IRA FEES</b>	
Alimony paid		Int Paid on Contract Home Purchase		<b>GAMBLING LOSSES</b>	
ROTH contribution records		Name/Address/SS# of Contract Holder		<b>CONTRIBUTIONS</b>	
Teachers: expenses for supplies		First Year Private Mortgage Insurance		By Cash Or Check	
Home improvement receipts		Investment Interest Expense		Miles for Charity	
Child daycare expense				*Non-Cash: clothes, furniture, etc.	
				*Fair Market Value of Items given to charities. If over \$500, provide documentation.	