

Below is the list of questions our office is required to ask when you drop off your taxes. If you can please take a moment to review these and organize your paperwork as shown here it will make the drop off go much faster. Thank you!

Did Tami do taxes last year?	Yes	No	If no need last yrs. taxes, copy of ss card
Drop off form filled out	Yes	No	
Do we have a copy of your Driver's License or State ID?	Yes	No	
Did you have health insurance thru the Marketplace?	Yes	No	<u>MUST HAVE 1095-A from Marketplace</u>
Do you have any new dependents	Yes	No	Make sure all the child's personal info is on drop off form. Need copy of child's SS card
Are you claiming a child under 17	Yes	No	need to fill out back of EIC
Do you expect to receive EIC	Yes	No	can only claim if income qualifies and claiming child who lived with you over 50% of the year - if yes fill out EIC form front & back
Are you claiming a child for whom you do not have primary placement	Yes	No	If Yes - need 8332 or court document prior to 2008
Did you or your dependent attend College?	Yes	No	If Yes Need 1098-T if any money paid out of pocket or with a loan & receipts for school supplies, etc.
Do you expect to claim HOH (Head of Household)	Yes	No	Must be single & have a qualifying dependent. Fill in and sign back of EIC for HOH area
Were you employed last year	Yes	No	need W2's or 1099's (Group them by person)
At any time during 2022 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	Yes	No	Will need transaction records for each transaction. Purchasing currency is not a taxable transaction that needs to be reported
Did you receive unemployment	Yes	No	need 1099 G
Did you receive income from retirement, IRA, interest or other misc. income?	Yes	No	need 1099-R, 1099-SA, 1099-INT or 1099-MISC
Did you own a home in 2022?	Yes	No	Any mortgage 1098 & any property tax paid in 2020. If bought home 2020 need settlement statement
Did you sell, trade or exchange any Virtual Currency?			Need a transactional list
Do you own your own business	Yes	No	Schedule C info (income/ expenses) We may need to do a spreadsheet for them
Do you own rental property	Yes	No	Schedule E info
Do you own a farm	Yes	No	Schedule F info
Did you purchase a home in 2008 & Need to pay back 1st time home buyer	Yes	No	
Did you rent in 2022? Might you qualify for homestead if household income is less than \$24,680	Yes	No	Total rent paid _____ Was heat included? If trying for Homestead need a clean Rent Certificate Signed without any extra markings
Do you want Direct Deposit	Yes	No	Fill out on Drop off Form Make Sure It's Updated!! Especially if bank changed name
Do you have an appt. scheduled	Yes	No	Date & Time:

If you have a small business here are some things that we would be looking for to complete your taxes. Not all will apply to each business, but this should give you an idea of what is needed. We only require totals of most things; however, you will want to hang on to receipts and any proof of your numbers for 7 years.

1. Income:

Gross Receipts or Sales: _____

2. Expenses:

Advertising: _____

Car & Truck expenses (Business)

- Miles from 1/1/22 – 6/30/22: _____
- Miles from 7/1/22 – 12/31/22: _____
- Fuel: _____
- Repairs & Maintenance: _____

Commissions and fees: _____

Contract Labor: _____

New purchases to be depreciated: _____

Employee Benefit Programs (Other than Pension): _____ Insurance (Other than Health): _____

Interest (Business): _____

- Mortgage: _____
- Other: _____

Phone/Internet: _____

Legal and Professional Services: _____

Meals: _____

Office Expenses: _____

Pension & Profit-Sharing Plans: _____

Rent/Lease: _____

- Vehicle's, Machinery, and Equipment: _____

Repairs & Maintenance: _____

Supplies: _____

Taxes & Licenses: _____

Travel: _____

Utilities (If business utilities are metered separate): _____

Other Expenses: _____

3. Costs of Goods Sold (All at Cost):

Inventory at the beginning of the year: _____

Purchases: _____

Inventory at the end of the year: _____

4. Expenses for Use of Home:

Square Foot of Area used regularly and exclusively for business: _____

Total area of home: _____

Mortgage interest: _____

Real estate taxes: _____

Homeowners insurance: _____

Rent (if you do not own your home): _____

Repairs to house: _____

House Utilities: _____

Helpful app to check out especially if you do not use QuickBooks or are on the road often. Check out -

STRIDE

<https://www.stridehealth.com/app>