



K Harrell's Tax Service

What Should I Bring To My Appointment?



W-2, earnings statement or paystub for W-2 download



Driver's License(s)



Social Security card or cards



Last year's Federal and State tax returns



Social Security numbers and birth dates of dependents

Income Sources

- W-2
- Self-employed business income and expenses / 1099-MISC
- Commission you received or paid
- Pension or retirement income / 1099-R
- Unemployment income / 1099-G
- Social Security Income / SSA-1099
- Alimony paid or received
- Lottery or gambling winnings/losses (If you itemize, even if you have winnings, losses may be listed on Schedule A in your favor)

State & Local Taxes

- State or local paid
- State refund amount / 1099-G
- Estimated taxes or foreign taxes paid

Family

- Medical and Dental Expenses
- Child care expenses and provider information
- Mileage records to doctor appointments

Savings & Investments

- IRA Contributions
- Interest and dividend income/ 1099-INT or 1099-DIV
- Statements on stock or bond sales/ 1099-B

Work Expenses (Unreimbursed)

- Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work.
- Job-related educational expenses

Education Expenses (Unreimbursed)

- Classroom expenses for teachers
- Tuition, books, supplies/equipment needed for a course of study, notebooks, eBooks, education fees, non-academic fees, student activity fees, athletic fees.
- Student loan interest / 1098-E

Other

- Charitable donations, cash and non-cash
- Casualty or theft losses
- Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.
- If rental property is owned, a landlord is allowed to deduct any reasonable expense used in the maintenance and managing of the property. This includes:
 - Utilities
 - Taxes paid on property
 - Necessary and reasonable repairs
 - Employee's wages
 - Independent contractor's expenses paid
 - Insurance for the property
 - Legal and professional services
 - Travel costs incurred while doing business.
 - ❖ **Please have all receipts and documentations for deductions and expenses paid.**
- If you are a homeowner, there are tax deductible expenses. This includes:
 - Home Mortgage Interest Payment
 - Mortgage Points
 - State and local property taxes
 - Interest payments on home equity loans and lines of credit
 - Residential energy efficient property savings
 - Conditional Deductions: Moving costs (if you are military), casualty and theft losses (if you are in a federally declared disaster area), and home offices (unless you are self-employed)
 - Not Covered Expenses:
 - Fire, flood, or homeowner insurance payments
 - Extra money paid to reduce the mortgage principal
 - General home improvements, repairs, and maintenance expenses

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- Mortgage insurance premium payments
 - Nonbusiness energy property savings
 - ❖ **Please send all documentation for these deductions.**