

Happy New Year!

2010

The IRS is still heavy into audits – KEEP YOUR RECEIPTS! WE EXPECT TO CONTINUE TO SEE A LOT OF AUDITS IN THE 2010 YEAR. If you receive an audit letter, call our office and come in to sign a Power of Attorney to have Lynda represent you – for fees starting as low as \$100.00.

WHAT TO BRING FOR YOUR 2010 TAX APPOINTMENT:

1. **A copy of last year's tax return.**
2. **Each person's Name, D.O.B., and Soc. Security Number (Soc. Sec. Card if new client).**
3. **Proof of INCOME EARNED:**
 - A. W2 FORMS, 1099 FORMS, AND K-1 FORMS
 - B. INVESTMENTS: 1099's for Dividends, Interest, and Stock Sales
 - C. UNEMPLOYMENT RECEIVED? \$_____ SOCIAL SECURITY? \$_____ (Bring Forms)
 - D. DOCUMENTATION OF ALL OTHER FORMS OF INCOME (1099-Misc, Foreign Income, etc.).
4. **Proof of EXPENSES:**
 - A. TOTAL MEDICAL EXPENSES: \$_____ (Must exceed 7 1/2% of Income to count.)
 - B. MORTGAGE INTEREST PAID: \$_____ PROPERTY TAXES PAID: \$_____
 - Interest on a Contract for Deed requires you to bring Name, Address, and SS# of Contract Holder.
 - C. CLOSING PAPERS FROM ALL PURCHASES/SALES/REFINANCES.
 - D. 2010 & 2011 PROPERTY TAX STATEMENT AND/OR 2010 CRP FORM.
 - E. CONTRIBUTIONS:
 - CASH/CHECK: \$_____
 - NON-CASH: \$_____
 - F. UNION DUES: \$_____ UNREIMBURSED JOB EXPENSES: \$_____
 - G. JOB SEARCH EXPENSES: \$_____
 - H. MOVING EXPENSES: \$_____ (If you moved 50+ miles because of a new job)
 - I. DAYCARE/PRESCHOOL EXPENSES PAID: \$_____
 - Please bring Name, Address, and Social Security Number (or Fed. ID#) for Daycare Provider.
 - J. EDUCATION EXPENSES FOR K-12 DEPENDENTS: \$_____ (who, what, why, amount)
 - K. COLLEGE/TECH. EDUCATION EXPENSES FOR SELF OR DEPENDENT: \$_____
 - L. STUDENT LOAN INTEREST PAID: \$_____
 - M. IRA, SEP, OR KEOGH CONTRIBUTIONS: \$_____ WITHDRAWALS: \$_____
ROLLOVERS: \$_____ (Please Bring Documentation of any such transactions.)
 - N. IF YOU RECEIVED OVER \$10,000.00 FROM ANY NON-TAXABLE FOREIGN SOURCES, YOU MUST REPORT IT TO AVOID A 50% PENALTY BUT IT WILL REMAIN TAX FREE.

Note: for 2010 – All donations need a receipt from the organization, as well as proof of payment (ie. Canceled check or credit card receipt)

FREE ELECTRONIC FILING!*

*Available Only With Paid Tax Preparation at Lynda Mohs Tax Service