

# Lynda R. Mohs Tax Service

*"We work for you, Not the IRS!"*

**Happy New Year!**

**2011**

The IRS is still heavy into audits – KEEP YOUR RECEIPTS! WE EXPECT TO CONTINUE TO SEE A LOT OF AUDITS IN THE 2012 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 2011 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, Stock Sales & Stock Purchases
  - 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. 2011 & 2012 PROPERTY TAX STATEMENT AND/OR 2011 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 (Bring College Papers):
    - TUITION & FEES: \$\_\_\_\_\_
    - BOOKS: \$\_\_\_\_\_
  - 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.

## **FREE ELECTRONIC FILING!\***

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