

**INFO YOU NEED FOR TAX PREPARATION**

- a. NAMES AND SOCIAL SECURITY NUMBERS
- b. BIRTH DATES AND ALL PHONE NUMBERS
- c. ADDRESS
- d. DEPENDENTS
- e. EMAIL ADDRESS

1. Did you have Health insurance for yourself, your entire family during 2014? \_\_\_\_\_.

a. Who pays premiums? b. Name of health insurance Co. c. Marketplace.

If no health insurance find out why. They may qualify for an EXCEPTION.

2. Medical expenses, prescriptions, medical miles? \_\_\_\_\_.

3. License Plate fees? \_\_\_\_\_.

4. Any other State or Local taxes? \_\_\_\_\_.

5. Mortgage Interest and Points documents included? \_\_\_\_\_.

If none, does taxpayer pay RENT? To whom, address, amount? \_\_\_\_\_.

If owned what is the 2014 taxable amount on property tax? \_\_\_\_\_.

If Land Contract, name, address, social security # plus interest? \_\_\_\_\_.

6. Charity? \_\_\_\_\_.

7. If not a past client, Last Year's tax prep fee? \_\_\_\_\_.

8. Union Dues? Are they on W2? \_\_\_\_\_.

9. Work expenses required? \_\_\_\_\_.

10. College education expenses for taxpayer and dependents? \_\_\_\_\_.

11. School expenses for employment? Explain \_\_\_\_\_.

12. Energy installs?\_\_\_\_\_.
13. Invested funds in a Personal IRA? \_\_\_\_\_.
14. Is taxpayer a Teacher or Education assistant?\_\_\_\_\_.
15. Did you buy anything out of State that you did not pay Sales/Use tax on?\_\_\_\_\_.
16. Safety Deposit Box?\_\_\_\_\_.
17. Gambling Income and Expenses?\_\_\_\_\_.
18. JURY duty?\_\_\_\_\_.
19. OTHER Income?\_\_\_\_\_.