

# 2016 Checklist

Please read through this questionnaire answering the questions and gathering all necessary paperwork to complete your tax return.

**WE MUST HAVE A COPY OF YOUR DRIVER'S LICENSE AND SOCIAL SECURITY CARD**  
in order to file your tax return!

Yes	No	
		Taxpayer(s) Name(s):
		Home Phone:
		Taxpayer's Cell Phone:                      Spouses Cell:
		Taxpayer's E-Mail Address:                      Spouses E-Mail:
		Has your marital status changed in 2016? If yes, explain.
		Have you been notified by the IRS of changes to prior returns?
		Are you claimed as a dependent by another person?
		Are there changes in the dependent information from the prior year?
		Do you have children under the age of 19, or a full-time student under the age of 24 with investment income greater than \$2,000?
		Did you provide over half the support of any person?
		Did you incur adoption expenses during 2016?
		Were you or your spouse permanently and totally disabled?
		Did you receive any disability payments in 2016?
		<b>Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2016?</b>
		If yes enclose 1099-C or 1099-A and all closing statements from purchase, sale or refinance.
		Did you incur any casualty of theft losses?
		Did you incur any non-business bad debts?
		Did you receive any income not included in this tax organizer? If yes, explain.
		Did you start a business, or purchase rental property?
		Did you sell or transfer any stocks or bonds in 2016?
		Did you own any securities that became worthless in 2016?
		Did you "roll over" a retirement plan distribution into another plan?
		Did a lender cancel any of your debt in 2016? Provide any forms 1099-C or 1099-A.
		Did you add energy efficient property/improvements to your home in 2016?
		Do you receive any non-taxable income? Please attach.
		<b>Income:</b>
		Wages-provide W-2's or 1099's
		Gambling winnings- provide W-2G's and any losses
		Interest and dividend income-provide 1099INT and/or 1099-DIV
		Refund of state or local income taxes

**Please bring all your documents to your scheduled appointment.**

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Yes	No	
		Alimony received
		Business income and expenses, including vehicle information & miles
		Rental income and expenses
		Partnership and S-corporation income – provide K-1's
		Sales or transfers of stocks & bonds- provide statements , 1099B
		IRA, pension and annuity distributions- provide 1099-R
		Unemployment compensation
		Social Security benefits- provide year-end statement
		Other income, such as jury duty, unreported tips, hobby income
		Retirement plan contributions (IRA or Roth IRA, SEP, etc.)
		Health Savings Account contributions and distributions, 1099-SA or 5498-SA
		Student Loan Interest paid
		Job related moving expenses
		Alimony paid, include recipient's social security number
		<b>Medical and Dental Expenses:</b>
		Prescriptions, <span style="color: red;">Form 1095A,B,or C- proof of Health Care/Marketplace</span>
		Health Insurance premiums, including COBRA and Long Term Care
		Doctors, dentist, hospitals, clinics, labs
		Eyeglasses, contact lenses, hearing aids
		Miles driver for medical purposes
		Other medical and dental expenses
		<b>Taxes:</b>
		Real estate taxes on principal residence
		Real estate taxes on additional homes or land
		Auto license registration fees based on value of vehicle
		Sales tax on large ticket items if using sales tax deduction- attach
		<b>Interest Expense:</b>
		Home mortgage interest paid on main or second home- provide 1098
		Points paid on loan to buy, build or improve main home or refinancing
		Mortgage insurance premiums
		<b>Credits and Tax Payments:</b>
		Child or dependent care expenses:
		Provide name, address, SS or ID number, and amount paid
		Education credit for taxpayer, spouse or dependent (1099T, college statements, books , supplies etc.) Provide printouts of tuition paid, cancelled checks or c.c. payments and receipts.
		Did you make energy efficient improvements to your primary home?

**Any unorganized records will be charged an organization fee of a minimum \$50/hour.**

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Yes	No	
		<b>Estimated tax Payments:</b>
		Federal –amounts and dates paid
		State –amounts and dates paid
		Local –amounts and dates paid
		<b>Contributions:</b> <a href="http://www.irs.gov/charities-&amp;-Non-Profits/Exempt-Organizations-Select-Check">http://www.irs.gov/charities-&amp;-Non-Profits/Exempt-Organizations-Select-Check</a> to see if an organization qualifies By cash (with receipt), check or credit card. You can deduct contributions of \$250 or more with a statement from the charitable organization. Noncash charitable contributions- Donation Value List available on <b>damtaxes.com</b>
		If over \$500, provide name and address of donee, description of donation
		Date of contribution and value at time of donation
		If donation is a vehicle, provide form 1098C
		Miles driven for charitable activities
		<b>Miscellaneous Deductions:</b>
		Job search costs
		Educator expenses
		Tax return preparation fee
		Investment expenses
		Safe deposit box rental
		Gambling losses (to the extent of gambling income)
		<b>Reimbursed employee expenses:</b>
		Travel
		Meals and entertainment
		Miles, parking and tolls
		Education expenses required to maintain your employment
		Tools, equipment, uniforms and protective clothing (include cleaning)
		<p>This questionnaire is intended to help you give us documents in order to prepare your tax returns. Please attach any forms or receipts that you feel are necessary in order for us to complete your taxes.</p> <p>Please contact us if you have any questions at:  <b>248-360-3711 Fax: 248-360-4199</b>  <a href="mailto:damtaxes@gmail.com">damtaxes@gmail.com</a>      <a href="http://www.damtaxes.com">www.damtaxes.com</a>            Check out our website blog and like us on facebook!            Due to identity theft and false tax returns the IRS is requesting that you  <b>Please remember to bring your driver's license and social security card to your next visit!</b>  <b>Any tax return received after April 1<sup>st</sup> will be on automatic extension.</b></p>

**Completed tax returns will incur the following charges: If emailed: \$5 If mailed: \$7  
Extra copies: \$25 . Appointments rescheduled more than once will be subject to a \$25 fee.**