



ASHWORTH TAX

CHILD CARE

BELOW IS AN ALL-INCLUSIVE CHECKLIST FOR WHAT YOU NEED TO BRING:

- New clients: bring a copy of your 2016 tax returns.
- Income source statements - W-2s and 1099 forms for: retirement income, investment income (i.e. interest and dividends earned, stocks sold), independent contract work, etc.
- Name, date of birth and social security number for new dependents.
- Mortgage interest/property taxes/mortgage insurance premiums paid. Bring IRS Forms 1098 to report this information (1st/2nd mortgages and home equity lines of credit). If you haven't received these forms, you may be able to obtain this information online or by calling your lenders. Interest on self-contained campers, motor homes and boats are also tax deductible.
- Closing statements for homes purchased, sold or refinanced in 2017.
- Sales tax paid on "big ticket" items such as automobiles, trucks, boats, etc.
- Charitable contributions (you must have receipts). Add up amounts paid with "money" (cash, check, credit/debit card). For items donated (clothes, appliances, etc.), estimate the "market value" of such items donated.
- Medical expenses - Only those that exceed 10% of your income are deductible (7.5% if 65 or older). If your medical expenses are significant, please have them totaled prior to your appointment.
- Child care expenses - For each individual/company used during 2017, provide the name, address, social security number (or federal ID number) and amount paid.
- Education tax credit (post high school college/vocational training). To claim this credit you must bring IRS Form 1098-T (issued by your educational institution) to our office. Add all receipts for books, supplies, equipment, etc. that were required for your courses.
- Unreimbursed job expenses - For example: union dues, professional publications, safety gear, job-related education/travel, job-related mileage. Only those that exceed 2% of your income are deductible. If your unreimbursed job expenses are significant, please have them categorized and totaled prior to your appointment.
- Businesses & Rental Properties - Total your income and categorize your expenses by type. For example: supplies, repairs, insurance expense, office supplies, travel, etc. Automobile use: determine the

miles driven during the year for your business and/or rental activities.

- Obamacare - If you paid for your own insurance at any time in 2017 through the “marketplace” (Obamacare), you must bring IRS Form 1095-A to our office.