

*A list of things to bring in.*

**All W2 forms – 1099's from pensions, IRA distributions, etc. and K1- forms. New clients bring in a copy of your 2023 Tax Return.**

*Interest income \_\_\_\_\_ Dividend income \_\_\_\_\_ Bring in the statements showing where you received the income.*

*Alimony received \_\_\_\_\_ Unemployment \_\_\_\_\_ Social Security \_\_\_\_\_*

*All other forms of income \_\_\_\_\_*

**\*\*\*If you sold stock you need purchase price and date purchased as well as sell price and sell date.**

*IRA, SEP, etc. Contribution \_\_\_\_\_ Health Insurance paid out of pocket \_\_\_\_\_*

*Medical and dental expenses must exceed 7 1/2% of your adjusted gross income. \_\_\_\_\_*

*Property taxes paid on your home \_\_\_\_\_ All other property taxes paid \_\_\_\_\_*

*License tabs for your car \_\_\_\_\_ Interest paid on your home \_\_\_\_\_*

*Interest paid on other property: Cabin, RV'S, Houseboats, etc. \_\_\_\_\_*

**If interest is paid on a contract for deed, you need name, address, and social security number of person you paid.**

**\*Interest paid on student loans may be deductible depending on modified AGI \_\_\_\_\_**

*Contributions paid by check or cash \_\_\_\_\_ Contributions non-cash \_\_\_\_\_ Charitable miles \_\_\_\_\_*

*Casualty losses for federally declared disaster areas only must exceed 10% of your AGI \_\_\_\_\_*

**Miscellaneous expenses have to exceed 2% of adj gross income and only deductible on\* MINNESOTA**

*Expenses looking for work \_\_\_\_\_ Mileage for temporary job sites \_\_\_\_\_*

*Unreimbursed employee expenses: Travel \_\_\_\_\_ Meals \_\_\_\_\_ Tools Etc \_\_\_\_\_*

*Certain business use of part of your home \_\_\_\_\_ All other expense for job \_\_\_\_\_*

**Gambling losses up to your gambling winnings are deductible on Schedule A Itemizing. Along with your receipts, you must keep a log of winnings and losses.**

**Daycare you paid if more than one provider list amounts separate \_\_\_\_\_  
You need name, address, and social security numbers or federal ID numbers on each provider you paid. If you have the cafeteria plan at your work, you still have to list the daycare provider.**

**Tuition and fees paid for college. This is for the American Opportunity credit and Life Time Learning Credit.  
You will need a form 1098T from the college to claim the credit.**

**Minnesota subtractions: private school tuition K-6 maximum \$1625. \_\_\_\_\_ 7-12th \$2500. \_\_\_\_\_  
Education credit/subtractions: tutoring, fees for after-school enrichment programs, music lessons, academic books and materials, rental or purchase of musical instrument, educational software, tuition for academic summer camp, instructor fees for drivers education if school offers credit, etc. For school supplies make sure you keep your itemized receipt.**

**FREE ELECTRONIC FILING WITH PAID RETURN. My prices will be as follows  
1040ez \$115.00 1040A \$135.00 1040 long form with itemizing \$145.00  
All other forms reasonably priced.  
Check or cashed preferred, will take credit card with 3 percent fee.**