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### **List of items needed to prepare 1040 tax return:**

- Driver's License or other form of ID for verification per IRS requirements!
- Health insurance verification – insurance cards!
- W-2 for wages
- 1099 interest statements
- 1099 dividend statements (if you own stock)
- Any other miscellaneous income, such as:
  - Refunds from NJ
  - Savers/Homestead Rebate
  - Unemployment
  - Gambling winnings
- Sale of Stocks – need date purchased, amount paid, sale date and gross proceeds from sale of stock. (Please provide all 1099-B Statements)
- Medical expenses:
  - Doctors, dentist, RX
  - Medical insurance premiums including Long Term Care insurance
- Real Estate taxes paid on your principal residence and any other property you own
- Interest paid on mortgage for your home and any equity loan interest paid – also need the outstanding principal balance at year end.
- Contributions paid to church and other charities – must have receipts!!
- Donations of non-cash items, such as clothing, bring list of items and any letters received from organizations as proof of contribution.

- Miscellaneous deductions, such as:
  - Union dues
  - Internet access fees
  - Safe deposit box fees
  - Job related education
  - Uniform costs and upkeep costs
  - Tax preparation fees
- Sales tax paid on purchase of any vehicles, boats, etc during the year.
- Rental property, if any:
  - Rental income received
  - Mortgage interest and taxes paid
  - Homeowners insurance
  - Repairs – need detailed list due to new **Regulations!**
  - Utilities
  - NJ Business Registration Certificates for all sub-contractors used
- Bring all Social security numbers and dates of birth for all dependents
- Bring a copy of 2012, 2013 and 2014 tax returns with you, if you are a new client.
- For self-employed individuals, please bring all 1099s received and a list of income for the year as well as a list of expenses for business for year, including:
  - Insurance, advertising, office expenses, postage, etc.
  - Car expenses – mileage for year plus mileage for personal and business use, as well as, actual auto expenses. Must maintain a log for deduction. Detail of repairs by invoice – **NEW!**
  - Travel for seminars, hotels, etc.
  - Assets purchased for business including computers and related equipment – specifically need date purchased and exact amount paid – if financed or leased please bring contracts.
  - Any other unusual items specific to your type of business
- Value of any IRAs at the end of the tax year
- Out of state purchases made during year for Use Tax for New Jersey

**New IRS Repair and Improvement Regulations apply to all real estate rental properties and every business. Must have details of purchases, repairs or maintenance to confirm to new REGULATIONS!**