➢ New Customers

PLEASE BRING IN YOUR 2014 TAX RETURN WITH YOU.

➢ Document Requirements for Taxpayer and Spouse.

We must comply with Federal Regulations by having the following documents on file:

- Valid Original Driver's License or United States Passport
  (No Photocopies or Expired Licenses will be Accepted)

- Original Social Security Card
  (No Photocopies)

➢ Document Requirements for Dependents

In order to claim Dependents you must be able to prove family or legal relationship

- For Children up to 15 years of age
  - Original Social Security Card (No Photocopies)
  - Birth Certificate (No Photocopies)

- Dependents above 16 years of age
  - Valid Original Driver's License (No Photocopies)
  - Original Social Security Card (No Photocopies)

Income

It is essential to report ALL SOURCES OF INCOME to prevent an AUDIT.

- Form W-2 (WE WILL NOT FILE TAXES WITH LAST PAYSTUBS)
  - It is essential that you report W-2 forms no matter how small employment period or pay amount.
  - W2's CANNOT be added to a future year tax return.
  - Most Employers will issue these form by Feb. 1st or make them available online

- FORM 1099-G (Unemployment Payments)
  - Log into Website in which you claim unemployment weeks and download your 1099

- FORM 1099-INT (Interest Payments Paid by Banks)
  - Compensation received from opening an account or interest from monies on deposit.

- FORM 1099-DIV (Dividends from Investments)
  - Please provide us with a User ID and Password to import your trade information from your brokerage account.
- FORM 1099-R (Withdraws, Distributions, Rollovers of 401K or Retirements Plans)
  - Loans against your 401k are not reported on a 1099R
  - All other transactions are reported on a 1099. If in doubt call your Retirement Plan administrator.

- FORM 1099 MISC (Independent Contractors or Other Income)
    - Income received from this form must be filed as a Business Return or a Schedule C on a personal return.
    - Provide PNL statement with Bank Statements (*If these documents are incomplete please schedule a bookkeeping appointment*)
    - Business Returns must be COMPLETED prior to Personal Returns.

- FORM 1099-B (Provided by Agents of Investment Income)

- FORM 1099-S (Income from the Sale of Real Estate)
    - Please call your title company to inquire if a 1099-S will be filed with the IRS

- FORM SSA-1099 (Income received from Social Security Administration)

- FORM 1099-G (Income from the Government)

- FORM 1099-K (Income received from Merchant Services or Online Sales *Example PayPal*)

- Schedule K-1 (Income received from S Corps, LLC, Estates and Trusts)

- W2-G (Casino Winnings, Lottery, and Gambling Proceeds)

- 1099-A (Abandonment of Secured Property)
    - Confirms that a property has been seized by bank or trust

➢ **Cancellation of Debt.** (1099 C)

- ❖ In today's tough economy more people are renegotiating their financial commitments.

  - Have you gone thru a Home Foreclosure the bank may have "Forgiven" an outstanding remainder of your loan?
    (*Unfortunately this is reported as taxable income to you. Please call your Attorney or Loan Servicing Company and inquire if a 1099 C will be issued in your name*)

  - Have you been contacted by Creditors regarding an outstanding Credit Card Debt or Loan Amount?
    Did they offer to negotiate the amount due on the loan as part of a settlement offer?

    These Companies will file a 1099 C to report the difference between the amount of the original debt and the payoff amount as taxable income.
    (*Call the company whom you took your settlement and ask them to email or send you the 1099 form that was filed.*)

➢ Own a Home

- ❖ Download Property Tax Bill from Tax Collector
- ❖ Download 1098 from Bank or Loan Servicing Company
- ❖ Receipts for Energy Efficiency Improvements

➢ Child or Elderly Care

(Did you pay for Dependent care in order to work or look for work?)

- ❖ Ask your Child or Adult Care provider to print or email you a receipt containing the following information
- Provider Legal Name
- Tax Identification Number or Social Security Number
- Amount paid to provider in 2014

➢ Adoption

(Did you attempt or adopt a child in 2015)

- ❖ Adoption order
- ❖ Certificate of Hague Adoption
- ❖ IH-4 Visa

➢ Charitable Donations of Money or Items to charities

- ❖ Letters of Donations
- ❖ Receipts Organizations gave you for Donated Items

➢ Purchased A New Energy Efficient Vehicle?

- ❖ Scan Sales contract and registration for vehicle
- ❖ Scan receipt for charging station and installation

Educational Expenses

- Form 1098-E (Student Loan Interest Paid)
- Form 1098-T (Fees Paid for Tuition)
- Endorsed Checks or Receipts showing payment of qualifying expense
- General Journal from Bursars Office verifying Enrollment status and paid tuition

Medical Expenses

- Receipts or bills for medical and dental care
- Record of mileage driven for medical treatment
- Statements from HSA or MSA accounts

Unreimbursed Employee Expenses

- Educator Expenses
- Unreimbursed work-related expenses
- Moving Expenses
- Legal Fees address work issues

Casualties and Thefts deduction

(Eligible property damage resulting from a disaster, storm, fire, accident, vandalism or theft)

- Provide copy of Police Report
- Insurance Claim Forms
- Documentation verifying cost basis or fair market value used to calculate loss
- Appraiser report of value of loss

➢ Health Care Coverage

(If you purchased Obamacare thru the Health Care Exchange.)

- ❖ Please download 1095 A statement from your health care exchange account.

➢ Direct Deposit

(Tax return will be eligible for direct deposit by)

- ❖ Scanning a check from your personal account to ensure a rapid refund.
- ❖ DO NOT scan a deposit receipt
  They contain information for internal banking purposes and is invalid for routing direct deposit!

➢ ARE YOU READY?

➢ Send us information (3 Ways to get your stuff to us)

1. **Go to 4taxcash.weeverapps.com and upload info**
2. **Download our app from Google Play Store or Apple App Store, use your phone to take legible picture, and use the email link to send us the information.**
3. **Scan your documents into your PC and send via email to Docu@emailitin.com**

➢Make an appointment (48 hours prior to your visit)

1. Use the scheduling Feature on our APP to make your appointment
2. Use our Website to make your appointment.

➢Confirm your appointment

❖ Scanning a check from your personal account to ensure a rapid refund.