

J & A INCOME TAX
51064 D.W. Seaton Dr, Chesterfield, MI 48047
Phone (586) 725-1633 Fax (586) 725-2650

PERSONAL INCOME TAX INFORMATION CHECK LIST

VERY IMPORTANT:

- 1) Please bring us your actual property tax bills, not just your mortgage interest statements
- 2) Provide 1099s with stock sale and cost information due to the tax treatment of capital gains and dividends
- 3) **To have your refund directly deposited, please make sure we have accurate bank information by providing us with a voided check.**
- 4) Please note, Foreign Owned bank accounts over \$10,000 must now be disclosed to the IRS
- 5) **Review attached ACA - Obama Care Checklist**

YOUR NAME: _____	S.S. NUMBER _____	DATE OF BIRTH _____
SPOUSE: _____	S.S. NUMBER _____	DATE OF BIRTH _____
ADDRESS: _____	PHONE: _____	
CITY: _____	STATE: _____	ZIP: _____

DEPENDENT INFORMATION - LIST NAMES, BIRTH DATES AND SOCIAL SECURITY NUMBERS

<u>NAMES</u>	<u>DATE OF BIRTH</u>	<u>SOCIAL SECURITY NUMBER</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

INCOME: PROVIDE ALL SOURCES OF GROSS INCOME - USE BACK IF NECESSARY

WAGES & PENSIONS
W2's and 1099's

Interest & Dividends (List Payee and Amount)
Banks, Stocks, Mutual Funds, Etc....

K-1'S, Capital Gains, Self Employment
Investments, Stock Sales (Need Cost and Date Purchased Also)

Other Income / Commissions / Alimony
Rentals, Gambling, Social Security, Other 1099's

DEDUCTIONS: PLEASE PROVIDE DOCUMENTATION

MEDICAL:

Prescriptions

Physicians (Including Dentists), Hospital Bills

Medical Insurance

CONTRIBUTIONS:

NOTE: Must have a receipt for any single donation of \$250 or more
Church

Miscellaneous

IRA CONTRIBUTIONS - REGULAR ONLY:

YOU _____

SPOUSE _____

COLLEGE TUITION 1099-T Forms, Student Loan Interest

Include Class Standing (Freshman, Sophomore, etc.)..

RENTAL PROPERTIES:

Income & Expenses

Please note: May need to issue 1099's to anyone paid over \$600

TAXES:

Personal Residence

HOME TAXABLE VALUE

Auto Registration Fees

INTEREST:

Home Mortgage

Home Equity/Student Loans

MISC. DEDUCTIONS: (Please List)

Union Dues

Safe Deposit

Tax Prep Fee

Other

Gambling Losses

Job Related

***** DIRECT DEPOSIT / BANK INFORMATION *****

Please attach a voided check if you would like to have your refund direct deposited in your bank account.

***** PLEASE REVIEW ATTACHED AFFORDABLE CARE ACT DOCUMENT - VERY IMPORTANT *****