J&A INCOME TAX 2015 CHECKLIST

51064 DW SEATON, NEW BALTIMORE, MI 48047 (586-725-1633)

INCOME

W2 and 1099 Forms
Dividends & Interest
Sales of Stock
Social Security
Unemployment Comp
Pension, IRA, Annuities
Self Employment
Rental and Royalty
Partnership and S-Corp
Estates and Trusts
Gambling Winnings
Alimony Received
Sales of Property
Sale of Residence
Child Support Received*
Workmen's Comp*
FIA Cash Benefits*
***Not taxable, but may be needed for state credit.**

ADJUSTMENTS AND CREDITS

HSA Contributions
Moving Expenses
Alimony Paid
IRA Contributions
Student Loan Interest
Day Care Expenses
College Tuition, Books
Educator Expenses

LOSSES

Gambling*
Only to the extent of winnings claimed as income, losses include losing lotto tickets, printouts from the casino.

ITEMIZED DEDUCTIONS

MEDICAL*

*** A portion may be deductible if total medical expenses for 2015 exceed 10.0% of your adjusted gross income.**
Insurance Premiums
Dental and Doctor
Optical
Qualified Medical Home Improvements
Medical Miles Driven
Long Term Care Ins.

SEE ENCLOSED ACA DOCUMENET

TAXES

Primary Residence
Second home
Vacant Property
License Plate Fees
State Sales Tax*
***Deductible if sales tax paid is higher than state tax withheld from W2, 1099 or Estimates.**

CHARITABLE

Cash and Check
Non Cash (clothing etc.)
Church Tithes
Volunteer Miles Driven
Please bring in proof for any contribution over $250.

INTEREST

Mortgage, Equity Loan
Qualifying Boat or RV
Interest, Investment

MISC DEDUCTIONS

***Expenses in this category are partially deductible if the amount claimed exceeds 2% of adjusted gross income. These items include, but are not limited to:**
Union Dues
Uniforms
Professional Dues
Tools and Equipment
Safety Gear
Tax Prep Fee
Business Mileage (57.5 cents per mile)
Safe Deposit Box
Investment Expenses
Qualified Meals
Job Hunting Expenses

- **Deductible when seeking a new job within the same line of work. Expenses include travel, employment agency fees, resume, etc.**

Energy Efficient Home Improvements.
O Windows
O Insulation
O Furnace
O Misc Improvements