



SIMPLEX

FINANCIAL SOLUTIONS

WHAT TO BRING

New Clients- 3 prior Tax Returns

- Dependents Social Security # Exact Name & Number(s)
- Amount of Child Care Paid Who Paid, Their Address, ID# of Business or Social Security #
- W2s/1099s
- Tips Earned: Tip Log Added-Up
- Interest Earned
- Dividends Earned
- IRA Withdrawal/Contribution
- Pension/Annuity Distribution
- New Home Purchase Papers
- Home/Real Estate Sale Papers w Tax Return from Year Prior Sale w Original Cost Papers w List of Improvements & Cost w New Home Purchase Papers
- Stock Sale Papers + Original Cost
- Business Income - Year's Total w Expenses by Category w # of Miles Driven w Medical Insurance
- Rental: Annual Income by Property w Annual Expenses by Property w Annual Expenses by Category w# Of Miles Driven by Property
- K-1: Partnerships/S Corporations
- K1: Estates/Trusts
- Unemployment Amount Received
- Social Security - RR Amount
- College Tuition & Books Paid
- Gambling Winnings/Losses w Gambling Log Book/Calendar
- Alimony Paid/Received w Ex-Spouse's Social Security #
- Major Theft/Accident/Casualty w Original Property Cost w Property Value at the Time w Property Value Afterwards w Photos w Police / Insurance Reports
- Bad Debts EMPLOYEE EXPENSES
- Moving w Lodging w Air, Train, Bus w Rental Hitch/Trailer/Truck & Gas, w Moving Van, Boxes, Tips
- Business Entertainment & Gifts
- Meals/Lodging Out-of-Town for: w Job Seeking w Business/Education
- Vehicle Business Use (not commuting) w Cost & Date Purchased w Total Job Seeking Miles w Total Business/Education Miles w Total Miles Driven this Year w All Vehicle Related Expenses by Category, by Vehicle MISCELLANEOUS
- IRA/Collection Fees
- Union/Professional Dues
- Job Related Education/Books/ Subscriptions
- Work Tools/Supplies

- Uniforms & Cleaning Costs
 - Resumes/Employment Agency
 - Licenses/Permits
 - TAM, Health, & Sheriff's Card(s)
 - Malpractice Insurance Cost
 - Phone w Beeper/Pager/Cellular Phone w Phone Extras (caller I.D.) w Pay Phone/Long Distance w Home Phone if 2nd Phone Line
 - Job Seeking/investment Related w Meals w Airfare/Car Rental/Lodging TAX
 - Personal Property Tax (boat motorcycle/mobile home)
 - Gov't Tax-Sup Gov't/Code # 99 amount (on the vehicle reg card)
 - Real Estate Tax Paid
 - State/Local Income Tax Paid
 - State Income Tax Refund MEDICAL
 - # Medical Miles: Physical Therapy/ Hospital/Doctors/ Pharmacy
 - Medical Insurance, Contact Lens, School, Cancer etc.
 - Insurance Reimbursement Amount
 - Prescribed Medicines/Insulin
 - Cost of Equipment/Maintenance
 - Doctors/Dentists/Hospitals/Labs
 - Chiropractors, Acupuncturists
 - Glasses/Hearing Aids INTEREST
 - Mortgage Interest (1st, 2nd) w Home Equity Loan Interest
 - Escrow Settlement Papers in the Year of Purchase
 - Investment Related Loans
 - Interest Paid to Buy Property
 - Margin Interest Paid
 - Business Loans CHARITY Need Letter or Receipt from Charity for Each Donation of \$250 or more
 - Volunteer Work - Miles Driven w Out-of-Pocket Expense w Uniforms & Cleaning Costs w Meals/Lodging Out-of-Town
 - Church/Tithing/Temple Dues
 - Cancer/Heart/Lung/Kidney/Vets/ Diabetes/Arthritis/Indian Missions
 - Scouts/X-A-Thon/Shop w/A Cop
 - United Way/KNPR, Channel 10 Combined Federal Campaign
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- Jerry Lewis/7-11/Firemen w/Boot
 - Can Goods/Toys for Tots
 - Donated Toys/Clothes/Furniture w Date Donated w Organization Name w List of Items w Original Cost of Donated Items w Value When Donated (Thrift Store /Garage Sale Value)

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