The information below is designed to be inclusive in an effort to meet all clients' needs. Therefore not all items will apply to your return; additionally, we cannot guarantee that other information not listed below will be requested. Thank you.

2013 TAX ORGANIZER

Our Mailing Address

Yahr Income Tax LLC
46450 263rd Street
Hartford, SD 57033

According to IRS Circular 230 we are required to verify your identity and keep proof of your identity on file.

So please ensure you bring a photo ID on the day of your appointment along with a SSN card for all dependents.

This is a necessary one-time inconvenience and ultimately for your protection and ours. Thank you.

- **The following list of information includes items for discussion during the interview process of your appointment in addition to related forms, deductions, etc. that will be required if applicable.**

- **Please provide the following:**
  - Your marital status or filing status.
  - **A copy of your 2012 return, if you are a new client.**
  - Name, Birthday, and SSN for yourself, spouse, and **each** dependent
  - If you've adopted a child please provide adoption information to include all fees paid in current year to facilitate the adoption.
  - We offer electronic filing. This enables direct deposit of refunds into your specified account. Please provide the financial institution, routing and the account numbers, for either a checking or savings account. As a first-time client this information will need to be verified a voided check is appreciated, but not necessary.
  - Please provide income statements; W-2's/1099's/Bonuses and any additional income.
  - Lottery and gambling winnings, prize money, etc.

- If you are unemployed and collected unemployment income bring unemployment income form (1099-G) from the state where it was received.
- Child Care/Day Care Expenses; we will require the name, address, phone number, SSN or EIN of the provider, and the total amount paid.
- 1099-INT/ Dividend/ Combined interest and dividends earned related to stocks/investments/banking institution or IRS.
- State income tax refund received (1099 G)
- Retirement distributions (Form 1099-R)
- Social Security Benefits (Form 1099-SSA)
- Sale of stocks, bonds, etc. (Form 1099-B) Include basis information that includes original date if purchased and amount paid including reinvested dividends and capital gains.
- Year-end Mortgage interest statement (Form 1098) if not included on the statement, real estate taxes paid.
- Debt forgiveness or abandonment of property. (Form 1099-A; 1099-C)
- Student Loan Interest Paid (Form 1098-T)
- Educational expenses paid including tuition, lab fees, books, parking, etc. please provide your student status (freshman, sophomore, junior, senior, graduate, etc.)
- For military and independent contractors please provide **all deployment dates and location(s) of deployment** overseas and/or in a danger zone
- If you received an inheritance please provide details and K-1 from the estate (if applicable).
- If you have an S-corporation or you are a partner in a partnership provide your percentage of ownership and applicable K-1.
- If you have started an LLC, S-Corporation, or C-Corporation please contact our office directly for further instruction.
- If you **received** or **paid** out alimony provide the amount along with the name and SSN of person either paid to or received from.
- Real Estate Tax, City/local tax, personal property tax, and/or sales tax paid.
  The sales tax must exceed the state tax withheld

➢ **Medical Expenses**

- Medical miles
- Health insurance, medical; dental or drug expenses
  a) Heath insurance premiums; if it is an employer sponsored plan, please know whether it is paid with pre-tax dollars; totals of other medical dental and drug expenses.

b) Lab fees, prescriptions, out-of-pocket expenses, hearing aids, glasses/contact lenses, other.

- Health Insurance (Pre-taxed i.e. cafeteria plan, 125_POP are not tax deductible)
- Long Term care Insurance premiums paid.
- HSA, Archer or Medical savings account contribution(s)/expenditures.

➢ **Charitable Contributions**, please provide itemized totals as applicable;

- CFC (Combined Fed Campaign)
- Navy/Marine Corps Relief (or current name)
- AFRH
- UDT/Seal Foundation (which is separate from the association)
- Navy Seal Foundation
- Fallen Comrades Fund
- March of Dimes, Red Cross, Salvation Army, Out-of-pocket volunteer expenses, American Heart, MDA/MS, Food Bank
- United Way, Easter Seals, YWCA/YMCA, payroll deductions
- MWR Fundraisers
- Church, Girl Scouts, Boys Scouts, CHKD, etc.
- Misc. Fundraisers (i.e. Toys for Tots, Angel Tree, etc.)
- Other named Charities and Churches
- Charitable Mileage (14 cents per mile)
- "STUFF" donated, ensure itemized list are available upon request, to include name address and EIN number of organization items given to, and date donated and fair market of household goods and clothing donated.
- Other Cash donations/contributions

➢ **Specific un-reimbursed military expenses**; we request an itemized list that shows a totals for each:

- Dry cleaning and starching
- Ribbons, medals and mounting
- Devices and insignias
- Alterations and striping
- Uniforms
- Base Rate-(Cell phone) [provided it is NOT your primary line]
- Misc. Team Equipment

- Professional Dues and Organizations
- Professional Books or Publications Costs
- Other [to include weapons, parachutes, etc.]

- **All other occupational un-reimbursed business expenses:** Please provide an itemized list with totals of un-reimbursed business expenses.
  - Supplies, food, travel, tolls, gas, mileage (ensure that mileage log is available), books, supplies, training, professional materials, and parking fees.
  - Cell phone fees (Itemized list of cell phone cost
  - Internet & Fax fees

- **Small Business Owners (Schedule C filers)**
  - If you started or terminated a small business (formation & termination dates)
  - Advertising and Promotional Costs
  - Customer/Client gifts
  - Health Insurance, including medical, dental, and long term care.
  - Insurance for theft, flood, fire, merchandise protection, credit, employee medical, malpractice, auto, performance bonds, business interruption, business overhead, workers' compensation, and use and occupancy insurance (to name a few)
  - Paid taxes to include state, local, and foreign
  - Office Expenses, Supplies, Computer Paper, Software, Postage [FedEx, UPS, USPS, DHL, other]
  - Continuing Education/Training expenses
  - Professional fees or club dues
  - Professional books or publication costs
  - Interest paid
  - Donations or Charitable Contributions
  - Energy Improvement costs
  - Travel-tolls, parking, etc.
  - Entertainment
  - Auto Expenses (ensure log with expenses and business mileage)
  - Business Mileage Please include business miles, commuting miles, and total miles per year)
  - Billed charges for 2nd phone line into the office/house (IRS, states that the 1st phone line is not eligible as a deduction)

- Include billed charges for all long distance costs for both the primary and secondary lines.

- **If you have a home office please provide the following**:
  - Sq. footage of your office space
  - Total Sq. footage of home
  - Repairs and Maintenance costs
    a) Office only
    b) House as a whole
  - All utilities used including electricity, gas, fuel oil, trash removal etc. itemized list of total cost for each utility (Water if it is a business that requires it: such as hair salon, Mary Kay, etc.)
  - Total Mortgage or Rent
  - Other expenses to include Condo/Homeowners association fees, pest control, lawn care, etc.

- **Energy Credits**
  - The cost of certain high-efficiency heating and air conditioning systems, water heaters and stoves that burn biomass all qualify as an energy credit including the labor costs for installing these items. Additionally, the cost of energy-efficient windows and skylights, energy-efficient doors, qualifying insulation and certain roofs also qualify for the credit, though the cost of installing these items does not count.

- **Energy Credits**
  - There are additional credits for residential energy efficient properties. Homeowners going green should also check out a second tax credit designed to spur investment in alternative energy equipment.
  - The residential energy efficient property credit equals 30 percent of what a homeowner spends on qualifying property such as solar electric systems, solar hot water heaters, geothermal heat pumps, wind turbines, and fuel cell property. Generally, labor costs are included when figuring this credit.
  - Not all energy-efficient improvements qualify for these tax credits. For that reason, homeowners should check the manufacturer's tax credit certification statement before purchasing or installing any of these improvements. The certification statement can usually be found on the manufacturer's website or with the product packaging. Normally, a homeowner can rely on this certification.

The IRS cautions that the manufacturer's certification is different from the Department of Energy's Energy Star label, and not all Energy Star labeled products qualify for the tax credits.

For more information regarding energy efficient products, etc. please visit www.energystar.gov, www.irs.gov or contact us!

- For your return please specify the amount spent for each residential energy upgrades. Ensure you retain manufactures certification statement and save receipts.

- **Rental Property-provide information for each property;** if the property was acquired in 2011 please provide all 8 items listed below. If the property or properties were included on previous returns that we did not file please bring a copy of last year's return.
  - Rental Income
  - Repairs/Maintenance, yard work, termite treatment, etc.
  - Additional Expenses: keys, condo/homeowners assoc. fees, management fees, etc.
  - City Assessment
  - Date you started renting
  - Cost of property
  - Travel expenses to and from property for maintenance, inspection of property, picking up rent, mileage etc.
  - If you **sold** rental property in 2011 we need both the initial HUD-1/Mortgage Settlement statement received when purchasing the property and at closing when the property was sold. Please include any improvements made to the property that were not included as rental expenses.

- **NOTES/QUESTIONS FOR YOUR APPOINTMENT:**

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Please provide any additional information that is not included on this list but pertinent to your return. Please feel free to visit our website for a complete list of our services at www.yahrincometaxllc.com. Please contact us via e-mail at ayahr@yahrincometaxllc.com or by calling the office at **(952) 292-3776** for questions, concerns, or to cancel or reschedule your appointment. We appreciate our clients; thank you for being one!