WHAT TO BRING TO YOUR TAX APPOINTMENT

In order to ensure that we are accurate in preparing your return(s), please be sure to bring all income and expense documents which include, but are not limited to, the following:

1099-A Child Care Provider

1099-B W-2G Statement

1099-c 1098 (Mortgage)

1099-DIV 1098-T(Tuition)

1099-INT 1099-SA (Health Care

1099-G Savings)

SSA-1099 (Social Security) 5498-SA (Health Savings) 1099-R (Retirement) 1095-A (ACA Marketplace

1099-MISC Statement

 Itemized Tax Deductions

 Medical expenses including medical insurance (not premiums deducted from paycheck if pre-tax deduction), expenses, and mileage.

 Forms 1098 or other mortgage statements. Closing statements if you purchased a home or refinanced your home in 2022.  Real Estate taxes paid

 Cash amounts paid to qualifying charities (must have statement and cancelled checks if over $250)

 Records of non-cash donations to charitable organizations (must have list of items donated and their fair market value) include mileage driven for charity.

 Expenses related to investments o Details of any thefts or casualty loss.

 Employment related expenses that were "NOT" reimbursed by your employer.

Exception is if your employer included reimbursement in your wages.  Job hunting expenses.

# SELF-EMPLOYED OR HAVE RENTAL PROPERTY

* For Business Owners

 Books/accounting records for your businesses income and expenses.

 Record of all major purchases such as equipment, machinery and furniture. o Logs or other records detailing business mileage.

 Inventory records (beginning inventory from January 1, 2022, purchases and ending inventory from December 31, 2022)

 If home used for business provide square footage of home, square footage of home office. Include cost of home, or rents paid utilities, insurance, repairs and maintenance, mortgage interest, property tax etc. Any other expenses of the home office such as purchases of office equipment.

* 1099-K (Merchant Card and Third Party Network Payments)

 First time clients be sure to bring your cumulative Depreciation Reports.



* Rental Income Property Owners

 Cost of rental property and date purchased (bring closing documents for newly purchased property).

 Rents and deposits collected for the tax year.

 If rental property has been sold bring closing documents for both the sale of the property and the purchase.

 Mortgage interest and real estate taxes paid, and costs of repairs, improvements and other expenses.

 First time clients be sure to bring your cumulative Depreciation Reports.

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