



Client Name: _____

Client Phone: _____

Totals Only

Insurance Premiums

- _____ Health, Supplemental Medicare
- _____ Taxpayer Long-term Care Premiums
- _____ Spouse Long-term Care Premiums

Medical Travel

- _____ Number of miles
- _____ Lodging

Medications & Drugs

- _____ Prescriptions

Doctors, Dentists, Other

- _____ Doctor/Dentist, Psychiatrist,
Chiropractor, Acupuncture, Optometrist,
etc.
- _____ Hospitals & Nursing Homes

Other Medical & Dental Expenses

- _____ Eye Glasses, Contact Lenses
- _____ Hearing Aids & Batteries
- _____ Lab Fees
- _____ X-rays
- _____ Hospital Supplies
- _____ Crutches, Wheel Chairs, Canes, Braces
Orthopedic Shoes, etc.
- _____ Humidifiers for Severe Allergies
- _____ Prescribed Exercise or Weight Loss
Program
- _____ Physical Therapy

Miscellaneous Deductions

- _____ Union Dues
- _____ Tax Preparation Fees
- _____ Safe Deposit Box
- _____ Educator Expenses
- _____ Job Related Licenses
- _____ Tools & Supplies used for work*

Original Documents

Taxes Paid

- State & Local Income Taxes
- Real Estate Taxes
- Vehicle License Tax (VLT) fees

Major Purchases

Did you purchase a new vehicle? RV? Boat?
Please bring in your purchase contract

Mortgage Interest Paid

- Home mortgage (bring form 1098)
- Home mortgage NOT on 1098
 - Name of person
 - Address
 - SS#
 - Amount paid

Gifts to Charity

- Gifts by cash or check (bring receipt and/or canceled check)
- Non-cash donations* (bring receipt and list of items)
- Miles driven for charity (bring mileage log)

Affordable Care Act (Obamacare)

If you purchased your health insurance through the Health Insurance Marketplace, bring in form 1095-A.

Additional Organizers

Visit our website at mditaxes.com under "Organizers"

- Business use of home
- Self-employed income/expenses (schedule C)
- Employee vehicle use
- Non-cash contributions
- Un-reimbursed employee expenses
- Employment related education

* All of our organizers are available on our website at mditaxes.com



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PLEASE BRING ORIGINAL DOCUMENTS

- Wages (W-2)
- Interest Income (1099-INT)
- Tax Exempt Interest (bring statements)
- Dividend Income (1099-DIV)

- Pensions/Annuities (1099-R)
- IRA Withdrawals (1099-R)
- Social Security (1099 SSA)
- Unemployment Compensation (1099-G)

- State Income Tax Refunds (1099-G)
- Gambling/Lottery (W-2 G)
- Royalties (1099-Misc)

- K-1 for Partnerships, S-Corp
- K-1 for Estates & Trusts

- IRAs (bring year end statements)
- IRA deduction amount paid
- 401(k)s (bring year end statements)
- 403(b) (bring year end statements)
- Keogh and self-employed SEP & Simple
- Health savings account (bring statement)

- Property or Land Sold – bring original purchase statement and selling statement

- Foreclosure/Debt Cancellation – bring forms 1099-A & 1099-C

Childcare

- Name, Address, SS# or EIN# of each provider
- Amount paid to each provider
- Amount paid for each child

Credits (bring original documents)

- Tuition Credit
- Student Loan interest
- Donations to Arizona Schools
- Adoption credit
- Energy efficient home improvements

Rental Income & Expense*

Call for an organizer or visit our website at mditaxes.com and click on “Organizers”

Business Income*

- Business Income & Expenses
 - Auto Expenses
 - Mileage Log
- Call for an organizer or visit our website at mditaxes.com and click on “Organizers”

Investments & Stocks

- Purchase statements/cost basis
- Year-end statement (all pages)
- 1099-B
- Investment Expenses _____

- Alimony received and SSN of payer
- Alimony paid and SSN of recipient

- Moving expenses.** Bring paperwork for:
 - transportation and storage of goods
 - lodging/travel during move (exclude meals)
 - miles from old home to new workplace
 - miles from old home to old work place

* All of our organizers are available on our website at mditaxes.com