

ADVANCED BUSINESS CONSULTANTS

Tax Appointment Worksheet for Tax Year: _____

The tax season is nearing with a number of past changes. The Tax Appointment Worksheet is a tool to help you gather the needed information for new and returning clients. This year's worksheet has been enhanced to reflect the past changes in tax law. The mileage numbers have also changed. The worksheet includes a section for bankruptcy filing, debt forgiveness, and repossessions. The First Time Homebuyer Credit must be recorded for this year as well as last year to ensure that any recapture is handled in the future, if necessary. The Energy Credit is also a factor for this year and last. The more information you provide, the better we can help you.

#	X	EVENT THIS TAX YEAR	DOCUMENTS OR INFORMATION NEEDED
1		Married, divorced, or separated	Married: Prior year return of both spouses; Divorced: Divorce decree copy
2		Birth or adoption	Social Security cards and adoption papers
3		Death of child or spouse	Date of death
4		Additional members of household	Date of occupancy and relationship
5		Job change	Start date & name of new employer
6		Unemployment	Unemployment form
7		Retirement contribution	Type of plan
8		Retirement distributions	Form 1099-R
9		Social Security benefits	Form 1099-SSA
10		Sale of stocks, bonds, etc.	Form 1099-B or other sale documents; basis or original
11		Purchase of stocks, bonds, etc., personal residence, or other real	Purchase documents; closing papers
12		Inheritance Will	K-1 from the estate
13		Trade any property	Date of trade, property given up and property received, basis and FMV; qualified intermediary sales agreements
14		Start or end a small business	Formation or termination dates
15		Lawsuit settlements	Date received; reason for the settlement; 1099-MISC
16		Rental property	Income; Expenses; New property purchased
17		Prizes	Form 1099-MISC; value of prizes not included on Form
18		Lottery or gambling winnings	Total amount won whether on W-2G or not ; total
19		Health insurance, medical, dental, or drug expenses	Health insurance premiums; post-taxed payments; totals of other medical, dental, and drug expenses. If the health insurance is pre-taxed (i.e. cafeteria plan, Sec.125, POP), premiums have already been deducted from
20		Medical miles (24 cents per mile)	Total miles driven
21		State taxes income, property taxes paid, sales tax paid on vehicles,	Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property;
22		Purchase or refinance a home; first-time homebuyer prior to	Closing papers from purchase; Forms 1098
23		Charitable contributions of money, property, or out-of-pocket expenses	Date and type of contributions, knowledge that receipts from the organizations have been received; mileage log
24		Charitable miles (14 cents per mile)	Total miles driven
25		Transfer of IRA to charity	Brokerage statement showing transfer
26		Job-related expenses	Meals, lodging, and miscellaneous expense amounts for
27		Business miles (55 cents per mile)	Total miles driven, business miles driven per vehicle-
28		Educational/student loan interest expenses	Form 1098-T for parents or children; interest record for student loans
29		Child or disabled spouse care	The name, address, and ID number of the day care provider; the amount paid to the provider
30		Energy credit	Information regarding the purchase of qualifying vehicle, windows, doors, furnace, solar, or other energy
31		Bankruptcy filing	Date filed
32		Debt forgiveness or abandonment of	Form 1099-A for abandonment