

## REQUIRED CHECKLIST FOR TAX PREPARATION

**We can only do Ohio residents. We can't do other states unless you live in Ohio and work in a nearby state. If you recently moved to Ohio from another state we can NOT do your taxes this year.** PA residents can use Tax-Aide Locator to get locations in their state. Verify with me before making any appointments that are questionable.

**If you make an appointment and can't come on that day please cancel or you will be banned from using this program.**

1. Previous year's taxes
2. Driver's license or photo ID for yourself, your spouse, and any dependants on the return.
3. Social Security card if you are coming to the program for the first time for all people on the return
4. Paper copies of all forms. We can't use electronic forms that you have on your phone
5. A voided check or something with Bank Name, routing, and account number if you want direct deposit/debit. Deposit slips are unacceptable because some banks have a different internal routing number for deposits
6. Form 1095A if you have insurance through the Market Place
7. Business expenses and mileage totaled before arriving for your appointment
8. 1098T if you or a dependent are in college
9. Medical that you total prior to your visit by the category below. It may or may not help with the Federal Return, but it **can reduce your State tax liability**. We don't need to see your receipts and we can't add up your receipts when you come for your appointment.
  - Medicare supplement, drug, eye or dental insurance plans. Do NOT include what you pay for Medicare. Those payments are included in your Social Security statement
  - Doctor, dental, Vision visit copays
  - Prescription medicine copays
  - Glasses, hearing aids, etc.
  - Total medical miles driven and parking fees or tolls
  - If you have to spend the night in Cleveland, Pittsburg, etc for medical care you can deduct \$50/night for hotel stay. You can also deduct meals per the IRS guidelines
  - Long term care insurance premiums