

QUALITY TAX AND BOOKKEEPING SERVICE...2015 TAX PREPARATION CHECKLIST

Schedule A Itemized Deductions

Medical Expenses (if over 10% of your income)

- Med Insurance Premiums
- Co-payments
- Medical Mileage
- Eyeglasses
- Dentist
- Chiropractor
- Orthodontist
- Prescription Drugs
- Other Med Expenses

Taxes & Interest

- State and Local Income Tax
- Real Estate Taxes
- Personal/Excise Taxes

- Home Mortgage Interest
- Points Paid

Charitable Contributions

- By Check or Cash
- Other than by Check or Cash

Job Expenses (if over 2% of your income)

- Travel Expenses
- Meals & Entertainment
- Supplies
- Professional Books and Publications
- Uniform Costs
- Education Costs
- Professional and Union Dues
- Job Hunting Costs

Form 8863: Education Credits

- 1098-T from Qualified Institution
- Account Transcript from School showing payments made

Schedule C Profit and Loss From a Business

Income

- Gross Income
- Other Income

Expenses

- Advertising
- Bad Debts
- Car and Truck Exp/business mileage
- Insurance (other than health)
- Interest on any Bus.Loans
- Legal and Professional Fees
- Office Expenses
- Rent (property)
- Rent/Lease (Equipment)
- Repairs and Maint
- Supplies
- Taxes & Licenses
- Travel
- Meals & Entertainment
- Utilities
- Wages

Expense for Business

Use of Your Home

- Total Area of Home
- Business Area of Home
- Mortgage Interest
- Real Estate Taxes
- Insurance
- Repairs/Maintenance Done in Year
- Month/Year Home First Used for Bus.
- Your Investment in Home (purchase price + improvements)

Daycare Use

- Total Hours used for DC

Schedule E Property Rental

- Total Rents Received
- Portion of Blding used for rental purposes
- Advertising Costs
- Auto Expense/mileage
- Blding Insurance
- Legal/professional fees
- Management fees
- Mortgage interest
- Other interest
- Repairs
- Supplies
- Real Estate Taxes
- Utilities
- Month/Year building was first used as rental
- Purchase Price + added improvements

Schedule D Capital Gains/Stocks

- 1099B from stock company
- Date of Purchase
- Purchase Price
- Date Sold
- Amount of Stock Sold
- Sale Price

Form 2442 Child and Dependent Care

- Name of Person/Org who provided care
- SS# or EIN of Person/Org
- Amount Paid to Care Giver

Directions Refresher: Route 91 to Exit 16. Down ramp towards Holyoke. Straight through first light(Hillside Ave), left at next light (Route 5/Northampton St). Take a quick right into the Yankee Pedlar parking lot. Go to the back of the lot, then to the left and park in front of the building closest to Holyoke Hospital (there is a Quality Tax sign next to the door on a placard). Use the parking lot entrance (the back door) of the building. We are on the first floor: Rooms 411, 412, 413, and 414