

2B's INC

TAX & FINANCIAL SERVICES

17533 Fort Street

Riverview, MI 48193

(734) 281-2525 Fax (734) 281-2772

www.2bsinc.com

What To Bring To Your Tax Appointment

Personal Data

- Social Security Cards (including spouse and children) – for new clients and/or dependents
- Dates of birth for all
- Child Care provider: Name, address and tax I.D. or Social Security Number
- Alimony paid: Social Security Number

Income Information

- Last pay stub of year with 12/31 YTD totals
- W-2 forms for this year
- Form W-2G for Gambling and Lottery winnings
- Form 1099-G for Unemployment compensation
- Form 1099-G for State/Local Income tax refunds
- Form 1099-INT & 1099-OID for interest income
- Form 1099-DIV for dividend income
- Form 1099-MISC for Miscellaneous income
- Form 1099-R for Pensions, annuities, retirement plans
- Form SSA and/or RRB-1099 for Social Security and/or RR1 Benefits
- Form 1099-S for sale of real estate
- Form 1099-B for proceeds from broker statements
- Schedules K-1 for Partnership, S Corporation, & Trust income
- Alimony received
- Jury duty pay
- Prizes and awards
- Scholarships and fellowships

Adjustment and Credits

- Student loan interest paid
- Form 1099-E amounts paid for tuition/books/fees
- Early withdrawal penalties on CD's/others
- Child care expenses
- Adoption expenses
- Energy credit receipts

**Copy of
Last Year's Tax Return
If New Client**

Deductions

- *NEW FOR 2005*** Optional Sales Tax Deduction:
 - Receipts for "Big Ticket" items such as: motor vehicles, water crafts and home building materials, etc.
- Form 1098 for mortgage interest
- Second mortgage (equity) interest paid
- Real estate taxes paid - copy of tax bills
- Rent paid during tax year
- Moving expenses
- Personal property tax (License plate fees)
- Gifts to charity (qualified written statement from charity for any cash or check donations)
- Non-cash gifts to charity (used clothing/goods) Must have receipt stating "good/useable condition"
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Job-related education expenses
- Medical Savings Accounts
- Tax return preparation expenses and fees
- Gambling/Lottery losses up to extent of winnings

Self-employment Information

- Forms 1099-MISC, and/or your own records for business income
- Schedules K-1 for Partnership SE income
- Business-related expenses: Receipts, other documents and own records
- Employment taxes and other business taxes paid for current year: Payment records.

Miscellaneous Tax Documents

- Federal, state and local estimated income tax paid for current year:
 - Estimated tax vouchers, cancelled checks and other payment records
- IRA, Keogh or other retirement plan contributions
- Records to document casualty or theft losses
- Records for any other expenditures that may be deductible
- Records for any other revenue or sales of property (and the basis) that may be taxable or reportable