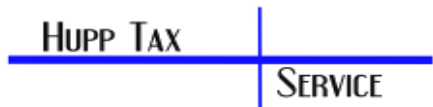


What to Bring

tax year 2017



32341 Vine Street, Willowick, OH 44095 ph: 440.944.4343 fax 440.944.4341 email: taxhelp@hupptax.com

Name: _____

- Anything marked "Important Tax Document"
- W2s, 1099s, etc. showing income
- 1098s & 1099s showing deductions, payments, etc.
- 1098-T for students. (REQUIRED for education credits)
- 1095-A, 1095-B and/or 1095-C for health coverage
- Prior year tax return (if not prepared by Hupp Tax)

Changes during 2017: Moved (when?) _____ Moved (where?) _____ Married _____ Divorced / Separated _____ Add / Lost Dependent _____

Self-Employed / Rental Property information:

Summarize income and expenses on separate sheet (if needed, see worksheets on our website: hupptax.com)
List equipment purchases and capital improvements separately, list dispositions separately

Quarterly Estimates (please specify if any amounts below were applied from prior year)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Federal payments					\$
Ohio payments					\$
City (RITA, CCA, Euclid, etc)					\$

Common Tax Breaks

IRA contributions

	Owner	Amount	Owner	Amount
Traditional		\$		\$
Roth		\$		\$

Health Savings Accounts (HSA) - Please include the 1099-SA.

Amount contributed	\$
Level of coverage	Self-only / Family
Was any part distributed NOT used entirely for qualified medical expenses?	non-medical amount \$

Child Care Credit - Expenses paid for day care in order to work or attend school

Child's name	
Provider Tax ID	
Provider Name & Address	
Amount spent for each child	\$

College Tuition - The student's 1098-T is REQUIRED.

Student's status as of 1/1/17 (i.e., freshman, etc)	
Other required educational fees, books	\$
How much tuition was /will be reimbursed by an employer, etc.	\$

Home office - an area regularly & exclusively used for business

Need sq feet of office; if using actual, will need all home expense: utilities, repairs, etc
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Itemized Deductions

Itemizing will help if your itemized deductions are more than your standard deduction.

Mortgage Interest & Property Taxes

Please note amount paid (unless already included on form 1098.)

	Interest	Property Taxes
Primary residence	\$	\$
Second home	\$	\$

Charitable donations

NOTES / OTHER INFORMATION:

IRS requires you to have receipts for ALL donations.

Cash/Check Donations

Church	\$
Red Cross	\$
Other	\$
Other	\$

Non-Cash Donations - If over \$500, additional detail required on tax return. Include receipt, list of items donated, value & how acquired.

Goodwill	\$
Purple Heart	\$
Other	\$

Medical Expenses - Must total over 10% of income to be deductible.

Health insurance premiums (not through payroll)	\$
Prescriptions	\$
Dentists, Doctors	\$
Hospitals, Labs	\$
Long Term Care Insurance	\$
Contacts, glasses	\$
Other	\$
Other	\$
Miles driven for medical	

Miscellaneous Deductions - Must total over 2% of income to be deductible.

Work related expenses not reimbursed by employer

Union Dues	\$
Uniforms	\$
Safety equipment	\$
Licenses, permits	\$
Other	\$
Other	\$
Miles driven for work (non-commuting)	
Any partial reimbursement for mileage by employer?	

<- Keep a mileage log & odometer readings!

Investment Advisory Fees	\$
Safe Deposit Box	\$
Gambling losses (to the extent of gambling winnings)	\$