

# AMERICAN CONSULTING PARTNERS CORPORATION

CPA, BUSINESS, and MANAGEMENT CONSULTANTS

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## MOST COMMON INFORMATION NECESSARY TO PREPARE YOUR TAX RETURNS

### Materials Recommended

The following list includes the most common items and materials that you may find helpful in gathering information for your Tax Return preparation. As tax situations vary by person, you may not need all of these materials or some additional information may be necessary.

#### General Information

- Social Security Numbers for you, your spouse and dependents
- Year of Birth for you, your spouse and dependents

#### Income Information

- Form W-2's for Wages, Salaries and Tips
- Forms 1099-INT & 1099-OID: Interest Income Statements
- Forms 1099-DIV: Dividend Income Statements
- Form 1099-G: Unemployment Compensation Received:
- Form 1099-MISC: Miscellaneous Income – for Independent Contractors and others
- Form 1099-R: Retirement Income
- Form SSA-1099: Social Security Benefits
- Social Security & Railroad Retirement Income
- Business Income and Expenses

#### If itemizing deductions:

- Medical expenses paid
- Miles traveled for medical purposes
- Home mortgage interest: Form 1098
- Real estate and personal taxes paid
- States taxes paid with last year's tax return
- Unreimbursed employee job expenses
- Charitable contributions
- Miles traveled while performing qualified charity work

#### Credits

- Educational expenses for you and your spouse
- Dependents higher education expenses
- Child Care expenses for each dependent
- Child Care Provider address & Federal ID Number/SSN
- Adoption expense information
- Retirement savings contributions
- Health Insurance Payments

#### Payments

- Estimated Tax payments made with ES vouchers
- Amounts paid with extensions filed
- Last year's tax refund overpayment applied to this years taxes

#### Deduction Expenses

- IRA Contributions
- Student loan interest paid
- Moving expenses

SECURELY FILE YOUR TAX RETURNS ONLINE WITH  
INTERACTIVE QUESTIONS AND ANSWERS  
GO TO

<http://www.acptaxsvcs.com/>

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1040EZ	<b>FREE</b>	\$9.95
1040A	\$19.95	\$14.95
1040	\$39.95	\$19.95