

4800 Dodge Street
Omaha, Nebraska 68132
402-551-1755



4523 North 30th Street
Omaha, Nebraska 68111
402-453-9999

WHAT TO BRING

As you gather your information for this year, the following list of items might be helpful.

INCOME STATEMENTS:

- W-2's from each place you were employed in 2011
- W-2 G's from any gambling winnings
- All 1099's including (but not limited to):
 - (1099 INT) Interest
 - (1099 DIV) Dividends
 - (1099 Misc-Non-Employee Compensation) Self-Employment Income
 - (1099 Misc-Rents Received) Rental Income
 - (1099 C) Cancellation of Debt
 - (1099 R) Pensions, Annuities, Retirement Plans
 - (1099 G) Unemployment
 - (1099 B) Broker transactions (ex: sale of stocks, stock options, etc)
- Social Security Benefits

CONTRACT LABOR/SELF EMPLOYMENT INFORMATION:

- Add all income earned from self-employment or contract labor
- Separate and total all expenses incurred as a result of self-employment income such as supplies, tools, materials, miles driven, car expenses, etc

ITEMIZED DEDUCTIONS:

- Medical and dental expenses including **after-tax** insurance premiums (total must be more than 7.5% of your adjusted gross income)
- Real Estate Taxes
- Personal Property Taxes (boats, cars, trailers, etc)—
- Sales Tax paid on Cars, Motorcycles, RV's, SUV's, Trucks, Vans, Off Road Vehicles & boats.
- Home Mortgage Interest (Form 1098 from Mortgage Company)
- Cash Charitable Contributions (Church, Salvation Army, United Way, any other national charity)
- Non Cash Charitable Contributions (Clothing, furniture, etc)

RESIDENTIAL ENERGY PROPERTY CREDIT:

- Proof of purchase of energy efficient improvements to your existing home

EDUCATION EXPENSES:

Qualified tuition and fees paid by you or through a loan to an accredited institution for either:

- Self (Form 1098-T)
- Dependents (Form 1098-T)
- Purchase receipts of required books, equipment and supplies

CHILD CARE EXPENSE:

- Provider name and address
- Social Security or Federal ID Number of provider
- Amount Paid

For those new to Associated Tax, please bring a copy of your previous year's tax return.

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you.

Associated Tax has been in the business of preparing tax returns for over 38 years and to this day it remains our main focus.

We look forward to seeing you soon. Thanks Again.