

AUSTIN TAX SERVICE CLIENT INFORMATION

- 1) Names, Social Security Numbers, Date of Birth, Occupation. (Include Children), Phone Number, Email
- 2) Banking Information – Name of Bank or Credit Union, Routing and Account Number (Checking or Savings)
- 3) The Affordable Care Act has been enacted & the following information is required –
 - a) Dependent's W-2s for household income – not added to your income
 - b) 1095A if you purchased your health insurance through the Market Place
 - c) 1095B if you purchased your health insurance through an insurance company
 - d) 1095C if your employer provides insurance for you (these will probably not be issued until 2016). If your employer does pay for your health insurance, a code "DD" should show in Box 12 of your W-2. If it does not, you will have to get a benefit summary from your Human Resources Dept. before your taxes can be filed.
 - e) Interest and Dividend 1099's (Stock)
 - f) Educator Expense (Teacher)
 - g) Student Loan Interest Tuition, Books, Fees & New Computer if child is attending college
 - h) 1098-T college tuition form
- 4) Other Information Needed if able to itemize (itemized deductions over \$24,800 MFJ, \$18,650 if HH, \$12,400 if Single or MFS)
 - a) Amount paid for License tabs
 - b) Property Taxes
 - c) Mortgage Interest & Mortgage Insurance
 - d) Charitable contributions
 - e) Tax return preparation fees for previous year
 - f) Union Dues
 - g) Safety & Protective Clothing & Work Boots
 - h) Cell Phone Expense if required for work
 - i) Work Tools for Mechanics
 - j) New Laptop for students
 - k) Health Insurance Premium
 - l) Prescription Expense
 - m) Doctor, Dental & Eye Glass Expense
 - n) Mileage for Medical Care
 - o) Housing Expense if Medical Care is Away from Home
 - p) 1098-T college tuition form
- 5) Did you move, Sell Home, Buy Home, New Renter?
 - a) Will need Landlords Name, address and amount paid per month.
- 6) Need driver's license #, issue date & expiration date