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Materials needed to prepare your personal or business tax returns for the 2016 tax year:

Your 2015 federal, state, and city returns. (If we did your taxes last year, we have them on file, and we'll prepare a 2016 Organizer packet for you at your request.)

For personal returns (Form 1040), select what applies in your case:

Taxpayer and spouse social security numbers and birth dates

Dependents, with birth dates and social security numbers

W-2's - and if you received any unemployment compensation, the 1099-G

1099's for interest or dividends

1099-B's for sales of securities (Find out what you paid for those investments.)

1099-MISC's for income earned as an independent contractor or landlord

1099-R's for retirement income

K-1's from partnerships, LLCs, S-Corps or trusts

Year-end **Social Security** statements

Estimated tax payments (to federal, state or local governments)

Childcare provider – name, address and federal ID, totals per child

1098-E or T's for student loan interest or tuition paid

IRA contributions – deductible or Roth?

Itemized deductions:

Medical expenses, including payments for health or long-term care insurance

State and local income taxes and property taxes paid in 2016

Mortgage interest paid in 2016

Charitable contributions that you can document

Unreimbursed expenses that you incurred for your work or moving

Expenses associated with investments

Did you have **health insurance** all year? Form 1095-A from the Marketplace?

Business income taxes: If you're a sole proprietor, your business income goes on a *Schedule C* on your personal return. Partnerships and most LLCs file a **Form 1065**, and *corporations file a Form 1120 or 1120S*. The following are needed in any case:

Federal ID number plus the business name and address

Type of business (what does it do?), and names and other data about owners

Receipts and expenses; bring an income statement and balance sheet if available,
or **we can do the necessary bookkeeping.**

Fixed assets (building, if owned; equipment, furniture, company cars)

Loans and payments for the year, with an amortization schedule if possible

Rental income and expenses

Farm income and expenses
Taxes paid by the business during the year