

173 Harleysville Pike
Souderton, PA 18964



Phone: 215-723-8999
Fax: 215-723-8828
www.MFBWM.com

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Income Tax Data you will need to Furnish

Please provide any and all of the following relevant information.

Basic Information

- Did you move? When? _____
- New Address: _____
- Any New Dependents? Need Dependents name, Social Security Number and date of birth. Did your filing status change this year? i.e., single to married.

Income information (Please send in ALL these documents that apply.)

- Provide all W2 wage statements. We must have originals, not copies.
- 1099-SSA; Year End Social Security Statement
- 1099-R; Year End IRA & Pension Distribution
- 1099-INT; Year End Interest Statements from Bank Accounts including Bond Interest.
- 1099-DIV; Year End Dividend Statements from Investments Accounts & Individual Stocks Held
- 1099-B; Year End Stock/Mutual Funds Sold – send all supporting pages for Cost Basis Analysis.
- 1099-G; Year End Unemployment Benefits Received.
- Did you receive Income from Executor Fees or Jury Duty? \$ _____
- K-1; Year End Reports for Estates, Trusts, Partnerships, S-Corps and Tax REIT's

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Retirement Information

- Contributions to IRA's, Roth IRA's and Non-Deductible IRA's, Simple IRA & Sep Plans

Self Employed Individuals

- Provide Gross Income (Including 1099 Misc & 1099-K credit card sales) and all expenses. List separately equipment purchases and vehicle mileage
(A worksheet is available on our website (www.MFBWM.com) to list this information.)
- Business Use of Home. Provide square footage or room used regularly for business and list all expenses in detail for maintaining the home.
(A worksheet is available on our website (www.MFBWM.com) to list this information.)
- Do you pay for your own Health Insurance? Provide the amount paid and if it an HSA plan.

\$ _____

Rental Property Owners

- If New Property Purchased; need settlement sheets from purchase and date Rental was established
- Provide Rent Received & All Expenses for each property; list separately any property improvements.
(A worksheet is available on our website (www.MFBWM.com) to list this information.)
- If this is the first year our office is preparing your tax return and you currently have a rental:
★ Must provide your previous year tax return along with the Depreciation Asset Worksheet



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Schedule "A" Deductions

- Medical Deductions; Need amounts paid for Supplemental Health Insurance, Prescription Insurance & Long Term Care Insurance along with total costs for out of pocket costs for prescriptions, co-pays, eye glasses, etc.. DO NOT include in these totals Amounts already deducted from SS Income or Pensions.
- Real Estate Taxes Paid; for all properties you own that are not claimed on another tax form. This may be already reported on your 1098-Mortgage statement.
- Mortgage Interest Paid – Need all 1098 Year End Statements.
 - ★ If you refinanced your home or did a second mortgage; provide your settlement sheets for eligible deductions.
- Charitable Contributions; Make sure you have receipts from the Non Profit to support the deduction you are claiming on your tax return.
- Miscellaneous Deductions:
 - ★ Unreimbursed Employee Expenses; expenses required for your job such as; Union dues, supplies, education expenses, travel, etc.
 - ★ Other Expenses; Safe Deposit Box, Annual IRA Fees, Advisory Fees.
 - ★ A worksheet is available on our website (www.MFBWM.com) to list this information.

Tax Adjustments and Credits Available

- Did you move this year? These expenses may be deductible if your move was more than 50 miles from where you previously lived.
- Are you paying on any Student Loans – Student Loan Interest is still deductible
- College/Tuition Expenses; even if this is funded by a loan your expenses are eligible for a tax credit.
- Child/Dependant Care, need receipt from provider to claim these expenses.
- Educator Expenses, this is eligible for teachers who provide school supplies.

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Pastors Tax Data

- Your salary Income should be reported on a W2
- Did you receive a Designated Housing Allowance? Please provide all your expenses for maintaining your home.
- Receive any honorariums; provide the amounts receive along with expenses against this income for Schedule C reporting.