

Real Estate Taxes – bring your property tax statements

	Your main residence
	Additional property, land or time shares

Mortgage Interest – bring your mortgage interest statements

	1 st Mortgage
	2 nd Mortgage
	Additional Mortgage Information
	Mortgage Insurance Premiums (Box #5 on the mortgage statement – this is not your property insurance for the house and fire))
	Closing costs on new home purchase – bring the closing papers – NOT ALL THE COSTS ARE DEDUCTIBLE – BRING THE CLOSING PAPERS

Gifts to Charities – cash donations – amount on left – name of charity on right

All donations must have receipts to be accepted by the IRS.

GoFundMe is not deductible.

Very important – donate to Goodwill, American Council of the Blind, Catholic Family Charities, Savers, etc. (Clothing, furniture, toys, etc.) AND GET RECEIPTS \$\$\$\$
BRING YOUR RECEIPTS

Child Care – You will need a receipt from the provider. The receipt must contain:

Name of Organization / or Person doing the day care

Complete address

EIN or Social Security number for the individual provider

Phone number

School Expenses

School loans – bring the forms (1098E) – not a picture on your phone

1098 T and expenses - Must Have the 1098T in your hands.

	Bring the 1098T for you, your spouse or dependent children
	Expenses – supplies, books, backpacks, computers, software, equipment, lab fees
	Parking fees, room and board,
	Tutoring
	Uniforms
	Transportation fees

This list will get you started – sometimes other factors may give you a tax deduction. The only dumb question is the one that you don't ask. So, ask that question – it MAY be deductible.

Questions you may have:

1. Do I need to make an appointment?
 - Yes
2. May I bring my children with me?
 - No – distractions may cause a mistake on your tax return
3. How much do you charge?
 - Prices are on the first page of the website. www.cranfordent.com
 - After October 15 the current year tax return becomes a previous year tax return. All previous year tax returns are \$400 and up
4. How long will my session last?
 - Depends on if you have this checklist completed and if you have all your forms. A normal session is one hour. Some may take 2 hours.
5. Are you able to do all forms for my tax return?
 - In most cases, yes. I have not had any exceptions yet.
6. How long will my refund take?
 - Normally a week to 10 days, but the IRS says 21 days if no problems with your tax refund.
7. I don't have copies of social security cards for my children, what now?
 - I will need proof that the child is your child. A previous tax return with their name and social security number will work, otherwise you will need to get a letter from the social security office.
8. Do you have my previous information from previous years?
 - Yes, but we need all information updated every year.
9. I forgot a form on my tax return, what do I do?
 - You may need to do an amended return – price starts at \$300 – discounts do not apply to an amended return.
10. What if I don't do the checklist and fill in my figures?
 - You can choose to pay regular price, use the standard deduction or take a chance on re-scheduling. Of course, I most likely won't re-schedule you.

FOLLOW INSTRUCTIONS – FILL IN THIS FORM WITH YOUR FIGURES.

11. You did not do my tax return last year. Will you do this year's tax return for me?
 - I am no longer taking new customers and if you skip a year you become a new customer. So, in other words – NO.