



DEDUCTION FINDER & WHAT TO BRING

HISTORY AND IDENTIFICATION

NEW CLIENTS	A COPY OF 2022 TAX RETURNS. Important Information for this year's return & Possibly Deductions, are there. Plus we can show you why things are different.
	DEPRECIATION SCHEDULES for Business Farm or Rentals, if not in last year's return
	SOCIAL SECURITY CARDS or clear copies, for you, spouse and dependents.
EVERYONE	SOCIAL SECURITY CARDS or clear copies, for New spouses and dependents.
	PICTURE ID FOR TAXPAYER & SPOUSE
	DATE OF BIRTH FOR TAXPAYER, SPOUSE AND DEPENDENTS
	VOIDED CHECK FOR REFUND DIRECT DEPOSIT
Identity Protection Pin	IP PIN if you have one. If you are in that program you must get a new IP Pin each year

DEPENDENTS

RELATIONSHIP	IF DEPENDENT IS NOT YOUR OR YOUR SPOUSE'S CHILD bring proof of relationship. <i>There MUST be a BLOOD or LEGAL RELATIONSHIP, (child, step-child, grandchild, brother, sister, niece, nephew). A Foster Child must be placed by the State, & live with you more than 6 months.</i> Birth Certificates connecting you to dependent, court orders of adoption, guardianship, placement. UNRELATED PERSONS must live with you the Entire year & be supported by you, Bring Proof.
EARNED INCOME CREDIT, CHILD TAX CREDIT & Head of Household	BRING PROOF OF RESIDENCY. You MUST be able to PROVE to the IRS what Your US Address was and that a Qualifying Child and/or Relative lived there with you for more than 6 months. Be sure to have utility bills, etc to prove Your residency for the year. Also BRING 2 items for each child with the Child's Name, Your Address & Dates spanning more than 6 Months. (ie. Dr. Bills, Pharmacy printout, or a Statement from School, Daycare Provider, Pastor, Landlord, DHS caseworker, etc.)
NON-CUSTODIAL PARENT	MUST BRING FORM 8332 SIGNED BY CUSTODIAL PARENT. The IRS REQUIRES this form for you to claim the Dependent Child. It HAS To BE ATTACHED TO YOUR TAX RETURN. The IRS DOES NOT ACCEPT a Court Decree even if it says Joint Custody. The Custodial Parent is the one with whom the child sleeps over the most Nights during the year. THE NON-CUSTODIAL PARENT IS NOT ELIGIBLE FOR EARNED INCOME CREDIT OR HEAD OF HOUSEHOLD STATUS
EDUCATION <i>Students often make mistakes that affect parent returns. If we do the Student's return, we can OPTIMIZE BENEFITS!</i>	FORM 1098-T(s) for this year & last year for TUITION paid for Anyone named on your tax return . STUDENT ACCOUNT STATEMENT FROM THE SCHOOL. A LIST OF THE PRIOR YEARS when the American Opportunity Credit was claimed. COST OF BOOKS & OTHER REQUIRED COURSE MATERIALS If in 1st 4 academic years FORM 1099 Q for 529 plan withdrawals. STUDENT LOAN INTEREST STATEMENTS.

OTHER ITEMS

ESTIMATED TAX PAYMENTS	List the Date and Amount of Each Payment, not a grand total, for both Federal & State. Do not include payments made in January of last year for the previous year
DAYCARE	Bring Statements from Providers showing name, address, tax id number & amount paid. ALSO break down the amount paid for each child. Provide the amount of employer daycare benefits you received
IRA-ROTH-HSA	Did you fund a HSA or an IRA, ROTH, or other retirement plan other than through work? Bring details. Did you ROLLOVER a Retirement Plan? There should be Forms 1099-R.
MINISTERS	Housing Allowance Designation Letter & list of housing Expenses, Form W-2 from the Church. Ministry Expenses IF you are IN Social Security or have 1099 Income. Worksheets are available.
SPECIAL SITUATIONS	Adoption; Death of Taxpayer, Spouse or Child; Marriage; Divorce; "Joint Custody"; Sale of Business; Purchase or Sale of Home or Real Estate etc. Bring all relevant documentation.
EDUCATOR	List your education, dues & other job expenses up to \$300 & remind me that you're an educator. List cost of Classroom Supplies Separately KEEP RECEIPTS! Get a Donation Letter from the school
MILITARY	Special Rules for ALL Military. Tell us if you were active duty, AND if you were War Zone Deployed
MILITARY MOVE (Military transfer only)	For a duty station move of over 50 miles bring the cost of hauling people & things, miles driven to new location (all vehicles), lodging, meals, distance from old home to old job & old home to new job
OK USE TAX	OUT OF STATE PURCHASES with no Sales Tax. There is a look up table, or bring the Amount.
FEDERAL RETIREE	We Need To Know If You Are CSRS, FERS only, Or a Combination. If a Combination, bring your benefit statement. Special Tax Deductions are available.
FORM 1095-A	If you had Market Place (HealthCare.gov) insurance, Form 1095A is Required to do the return.

If You Don't Document Your Deductions, the IRS Won't Let You Keep Them

OTHER ITEMS CONT.

CREDIT PAYBACK		If you took the 2008 Home Buyer credit (up to \$7500) Payback Continues This Year! Bring the info.
OTHER INFO		If you're not sure what it is, & It MIGHT have something to do with Taxes--BRING IT!
RETIREE		benefit statement. Special Tax Deductions are available.
ENERGY SAVING		windows, doors, heat pump, heat pump water heater, central a/c, wood stove, gas or oil furnace
CLEAN ENERGY		solar electric, solar water heaters, fuel cells, wind & geothermal energy generating systems

INCOME

TAX REPORTING FORMS		Bring Every Tax Reporting Form you receive. If it says W-2, 1099 or K-1 on the form, BRING IT. NEW - FORM 1099-K. Brokerage Firms and Mutual Funds will send a Year End Tax Statement.
CAPITAL GAINS		Did you sell ANYTHING? - Stocks, Bonds, Real Estate, Car, Collectibles, etc. Include ALL Real Estate & bring the Settlement Statements. Omit Non-Business, Personal Property (clothes, furniture, etc.) sold at a loss. Provide Date Purchased, Cost, Date Sold, Sales Price & for business assets, a Depreciation Schedule.
DIGITAL CURRENCY Crypto Currency Virtual Currency *BIT COIN, ETC.		Virtual Currency users have a REQUIRED DISCLOSURE. At any time during 2022, did you (a) receive as a reward, award, or payment for property or services; or (b) sell, exchange, gift or otherwise dispose of a digital asset or a financial interest in a digital asset? Sales of Digital Currency is taxed the same as capital transactions. Some platforms, like Robinhood Crypto, issue tax reports. Many others do not. There are services that will analyze your wallet(s) to generate the tax reports like zenledger.io & coinledger.io. Receiving Crypto can also be taxable depending upon how it is received.
FOREIGN BANK ACCOUNT/TRUST		IRS Requires disclosure of Foreign Accounts & Trusts you had control over at any time during the year. Special disclosures apply if the balance exceeds \$10,000 at any time. Huge Non-Disclosure Penalties. You Must report Income from foreign sources too, so Bring Info.
OTHER INCOME		ALL UN-REPORTED INCOME. Tips not reported to employer, income from side jobs, etc.--Even if paid in cash or "under the table". BUT you must be able to document this to claim EITC, etc.

GAMBLING

GAMBLING INCOME		W2-G'S Bring them, Plus, get a Print Out List of W2-G's from the Casino to be sure you have them all.
GAMBLING LOSSES		A DETAILED LOG of each "Gambling Session". Call or see our Website for a Sample Log.
		ATM RECEIPTS from the Casino. ALWAYS USE your Player's Card and get a WIN/LOSS Report.

BUSINESS AND RENTAL ACTIVITIES

TAX FORMS		FORM 1099-Misc, Form 1099-NEC, Form 1099-K, Form 1098, ETC. Bring all reporting forms.
EXPENSES		SUMMARY OF INCOME & EXPENSES. Worksheets are on TaxCrusader.com
		LIST EQUIPMENT PURCHASES & PROPERTY IMPROVEMENTS with Description, Date & Amount.

GIFTS & INHERITANCES

GIFTS RECEIVED		Gifts you receive are generally not taxable, but the Giver may have a reporting obligation.
GIFTS TO ANYONE		If you gave any person more than \$17000 during the year, in cash and/or in property value, list the date and amount of each gift. A Gift Tax return may be required.
INHERITANCE		Most things you inherit are not taxable, but some are. Bring the Information.

PERSONAL DEDUCTIONS - If > 27700 Joint, 20800 Head Household 13850 Single

MEDICAL Must exceed 7.5% of AGI		Doctors Dentists Chiropractors Eye Doctors	Hospitals Clinics & Labs Prescriptions Medical Mileage	Health Insurance Nursing Homes Home Health Medical Equip-Glasses-Dentures-Hearing Aids	Long Term Care Insurance Medical Travel & Lodging Home Modifications for Medical
No Cannabis Products					
TAXES Capped at \$10,000		State Income Tax Sales Taxes (Excise Tax & sales tax on large purchases)	Real Estate Tax	Personal Property Tax State Estimated Tax	
INTEREST		Bring all Forms 1098 for Home & 2nd Home (including Motor Home, Travel Trailer, House Boat) Only Interest on loans to Purchase or Improve the home is Deductible. For a Refi or HELOC Bring a schedule of how the Loan Proceeds were used.			
Other Interest		Investment Property Interest		New Property, Bring Closing Statement	
CHARITABLE CONTRIBUTIONS MUST BE PROVED → Teachers may count donations of class room supplies		CHURCHES & Other 501 (c)(3) Charities Bring a statement from the Charity with its name address, date, amount of donation & the legend "No Goods Or Services Were Provided In Exchange For This Donation" If you received something, the statement must show the value of what you got. NON CASH TO CHARITY- Provide the Receipt from the Charity providing its name, address & date. List what was given, the Original Cost & the Fair Market Value of each item (ie. Thrift Store Price). Any item > \$5000 Must be appraised. Gifts of cars require a statement from the Charity.			
JOB EXPENSES		NO LONGER DEDUCTIBLE. WE CAN DISCUSS how your Employer can help with a Tax Benefit			

Your Best Defenses Against The IRS Are Good Records & The Tax Crusader!