

DaleTax - Utah Valley's Premier Tax Accountants

Things to bring to DaleTax for your tax preparation appointment

- *If this is your first year at DaleTax, please bring your Previous Year Tax Return*
- **NEW FOR 2016** - Government issued identification for you, your spouse and ALL dependents. Birth Certificates, Driver's License, Passports are all acceptable forms of ID.
- *Personal Information: Social Security Numbers of self, spouse, children, and any other dependents Birthdays of self, spouse, children and any other dependents*
- ***If you had a new baby or dependent this year, please bring their Social Security Number***
- *Income Sources: W-2 Forms, 1099 Forms, SSA Forms, Unemployment Compensation, K-1 Forms, Gambling Winnings, Alimony Received*
- ***FORMS 1095-A IF YOU WERE ON THE HEALTH INSURANCE MARKETPLACE (IRS WILL DELAY PROCESSING OF RETURNS IF THIS FORM IS MISSING)***
- *Student Loan Interest or forms 1098-E*
- ***Proof of Health Insurance that is either Grandfathered (Grandmothered) or ACA Compliant. You can read more about Essential Minimum Coverage here <https://www.healthcare.gov/coverage/what-marketplace-plans-cover/> You might have to contact your Health Insurance Company prior to your appointment to verify that your coverage is NOT subject to the penalty.***
- *Medical Expenses Categorized*
- *Property Taxes paid*
- *Mortgage Interest Amounts (please include closing papers on refinance and new purchases)*
- *Charitable Contribution amounts (you will need receipts for all non-cash contributions)*
- *Non-reimbursed Employee Business Expenses*
- *Interest and Dividend Income*
- *Simple Self-Employment Income and Categorized Expenses (click here for a fill-in worksheet)*
- *Information for Stocks Sold (purchase price of stock and sale price of stock) (click here for a fill-in worksheet)*
- *If Rental Property is owned, please bring Rent Income Amounts & Expenses Categorized (click here for a fill-in worksheet)*
- *1098T for Education Expenses and totals for books and supplies paid*
- *If you have child care expenses, please bring amounts Paid; Name, Address, & Social Security Number of Provider*
- *Schedule K-1 for entities, S-Corporations, and Partnerships & Trusts*
- *Form 1099-SA for Health Savings Contributions and Distributions*
- *Energy Efficient Improvements on Primary Residence*

You must retain all receipts and records for substantiation