

GENESIS TAX SERVICE LLC

Michelle T. Brown, Owner

1525 Shellford Lane

Accokeek, MD 20607

301/283-3371 (press "3")

www.genesistaxsavings.com

michiebrown@comcast.net

TAX PREPARATION CHECK LIST

Use this handy checklist to ensure that you have all the documents you need to have your return prepared accurately and without delay. This is not a comprehensive list; if you have documents you're not sure about, bring them in and we'll review them.

INCOME

W2(s)	_____	State Refund Card	_____
1099	_____	Interest Income Statements	_____
1099R	_____	Stock/Dividend Income	_____
1099G	_____	Small Business Income	_____
1099 Misc.	_____	Social Security Income	_____
Alimony	_____	Gambling Winnings	_____

SCHEDULE A DEDUCTIONS

Medical/Dental/Glasses/Co-Pay/Prescription Out-of-Pocket Expenses	_____	Property Taxes	_____
Home Mortgage Interest	_____	Re-fi Settlement Sheet	_____
Closing Settlement Sheet	_____	Non-Cash Contributions	_____
Charitable Contributions	_____	IRA Contribution	_____
Teaching Expenses	_____	Tuition & Fees	_____
Student Loan Interest	_____		_____
Child/Dependent Care Expenses (need provider's tax ID or SSN)	_____		_____
Unreimbursed Employee Expenses: (mileage, uniform purchase/cleaning, equipment, union dues)	_____		_____

SCHEDULE C EXPENSES

(for small business owners)

Business Mileage	_____	Inventory/Stock/Supplies	_____
Office Expenses	_____	Marketing/Advertising	_____
Contract Labor	_____	Utilities	_____
Repairs/Maintenance	_____	Insurance	_____
Legal & Professional Fees	_____		_____

***NOTE:** Please bring **PHOTO ID, ALL RELEVANT SOCIAL SECURITY CARDS**, as well as your previous year's tax return (if available). If you are having your refund direct deposited, please have your routing number and account number (found on your check). If depositing into a savings account, your bank can give you their routing number.

Experienced

Reliable

Reasonable Fees

Christian Owned & Operated