



Your 2014 tax return checklist

Below are the items we need to complete your 2014 tax return. Please bring these items with you to your appointment, or mail them with your completed tax questionnaire.

- Sale of stock or personal residence
- Pensions and annuities - please bring 1099-Rs
- Unemployment compensation
- Social Security and railroad entitlement benefits
- Partnership, S-Corporation, trust, and estate K-1s
- State and local income tax refunds
- Gambling and lottery winnings, as well as, losses
- Other income
- Medical expenses
- Home mortgage interest
- Business and rental income and expenses
- Forms 109 5-A for advance payment of Premium Tax Credit under the Affordable Care Act
- HSA contributions
- Investment interest and expense
- Charitable contributions (cash and property)
- Out-of-pocket expenses for volunteer services
- Union and professional dues
- Childcare expenses
- Job-seeking expenses
- IRA, Keogh, SEP, and SIMPLE plan contributions
- Business use of car expenses
- Business travel and entertainment expenses
- Moving expenses
- Real and personal property taxes/statements
- Qualified educational expenses (tuition and books)
- Student loan interest
- Any IRS, Michigan or other tax notices

H&S knows the importance of planning for your financial future. Finding information and answers isn't always easy which is why your core team of professionals is here to help. Please check any of the items below that you're interested in receiving more information about.

- Retirement Planning** - Analysis of savings needed to retire, Roth IRAs, Traditional IRAs
- Education Planning** - 529 Savings programs, Coverdell ESAs
- Investment Options** - Portfolio Design, Portfolio Review, Estate Planning



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2014 Tax Questionnaire

Please return this questionnaire with your tax data or bring it to your appointment.

Name _____

Mobile Phone () _____ Home Phone () _____

Email _____

In an effort to ensure you pay the lowest possible taxes, we are asking you to take a few minutes to complete this questionnaire. The answers to these questions will help us ensure that you receive all possible deductions and credits that you are eligible for.

PERSONAL INFORMATION

- Yes No Did your marital status change during the year?
- If yes, did you change your name with the Social Security Administration?
- Did your address change from last year?
- Did you change any bank accounts that have been used for direct deposit?
- Can you be claimed as a dependent by another taxpayer?

DEPENDENT INFORMATION

- Were there any changes in dependents from the prior year?
- Did you pay for childcare while you worked or looked for work?
- Did you pay for childcare expenses through your employer's flexible spending plan?
- Did you provide over half the support for a parent or non-relative?

PURCHASES, SALES AND INHERITANCE

- Did you purchase or sell any real estate, partnership or corporation interest this year?
- Did you dispose of any stock during the year (other than stock held in your retirement account)?
- Did you inherit property in 2014?
- Did you purchase a vehicle in 2014?

ITEMIZED WRITTEN INFORMATION

- Do you have written evidence to substantiate charitable contributions?
- Did you make any non-cash charitable contributions (clothes, vehicle, etc.)?
- Did you use your car on the job (other than commuting)?
- Do you have written evidence to support business use of your vehicle?
- Did you work out of town for part of the year?
- Did you have any expenses related to seeking a new job during the year?
- Did you make any major purchases during the year (car, boat, etc.)?

MISCELLANEOUS INFORMATION

- Did you have qualifying healthcare for you, your spouse and your dependents for every month in 2014?
- Did you make any out-of-state purchase for which the seller did not collect state sales or use tax?
- Did you have any educational expenses during the year?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you participate in a Health Savings Account (HSA) or Archer MSA?
- Did you make energy efficient improvements to your main home this year (solar energy systems, geothermal heat pumps, wind turbines, or fuel cells)?
- Do you have any foreign bank accounts?

Your Signature _____ Date _____



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