✓ PAC TAX, 586 HAYWARD AVE N STE, OAKDALE MN 55128
PH: 651-738-0457 FAX: 651-734-9823 TOLL FREE: 1-800-822-3114

GENERAL INFORMATION AND INCOME

✓ APPOINTMENTS CALL 651-738-0457

Appointment Date:

Appointment Time (AM/PM):

Preferred Tax Preparer:

☐ ROBERT "BOB" ☐ GEORGE ☐ JENNIFER
☐ MARK ☐ CINDY ☐ DELORES

✓ METHOD OF PREPARATION

☐ APPOINTMENT ☐ FAX ☐ MAIL
☐ EMAIL ☐ DROP-OFF

Please pick a method which best suits your needs. Please return this PINK PREP SHEET along with all W-2's, 1099's, K-1's, Brokerage Accounts, and any other reported income items (copies are acceptable).

✓ PAYMENT FOR PREPARATION

Cash / Check / We do **NOT** accept credit cards

☐ Check box to authorize an ACH for tax preparation fee

✓ CONTACT INFORMATION

Primary Contact Name

Phone and/or Email

✓ FILING STATUS *(List changes from last year)*

☐ SINGLE ☐ MARRIED
☐ MARRIED FILING SEPARATE
☐ HEAD OF HOUSEHOLD
☐ QUALIFYING WIDOWER WITH DEPENDENT CHILD

✓ DEPENDENTS *(List changes from last year)*

Bring dependents' Full Name, Date of Birth, and Social Security Number

Full Name

Date of Birth

Social Security Number

WE PREPARE DEPENDENTS RETURNS AT SPECIAL RATES! Even though your dependent child probably knows more than we do, we can give you the best overall advice if you have your returns filed as a family. Don't file your dependents' returns based on incomplete or erroneous information. With the many education, child credits, and other factors, we can file with the best interests of all.

✓ PROPERTY TAX REFUND

Veterans that are 70% disabled can get a tax exclusion.

PROPERTY TAX REFUNDS ARE INCLUDED WITH YOUR TAX PREPARATION!!!

Your prepaprer will see if you qualify at later date even if you don't have your latest Property Tax Statement when you have your taxes prepared. If you might be eligible your preparer will put your information in a database and look it up online, efile it, and mail you a copy for your records. If you think you might qualify, give your preparer a friendly reminder.

✓ HEALTH INSURANCE (Bring form 1095 if provided)

If you obtained your health insurance through MNSure or another state sponsored program you must have your **1095A**

✓ INCOME *(List only if you DO NOT have statements)*

Salaries and Wages *(Bring W-2's)*	
Interest *(Bring 1099-INT's)*	
Dividends *(Bring 1099-DIV's)*	

Capital Gains/Losses *(Bring 1099-B's)*

*If your gain/loss is not furnished on your 1099, **you** must provide the property cost basis (what you paid for it) and when the property was acquired and/or purchased.*

Unemployment *(Bring 1099-G)*	
Social Security *(Bring 1099-SSA)*	
Railroad Retirement *(Bring 1099-RRB)*	
Pensions / IRA's / Ins Benefits *(Bring 1099-R's)*	
Gambling Winnings *(Bring W-2G's)*	
Alimony Received	
Business Income *(Bring itemized list)*	
Rental Income *(Bring itemized list)*	
Cash and Coin Found in Chesterfield	
Other (Bartering, Jury Duty, Prizes, etc.)	

✓ REFUNDS AND PAYMENTS

Previous State Refund *(New clients only)*	
Previous State Balance Due *(New clients only)*	
Federal Estimated Tax Payment	
State Estimated Tax Payments	

✓ DISCUSSION ITEMS

W-4 and Withholding	☐
IRA/Pension Contributions/Distributions	☐
Mutual Fund Selection	☐
Estimated Tax Payments	☐
Starting Your own Business	☐
Life Insurance *(Buy Term)*	☐
Sale of Stock or Property	☐
Annuities *(Why most should avoid)*	☐

✓ CONSULTATIONS

While we will do our best to answer your many questions during your appointment, our primary goal is to get your tax return prepared. We are available year round for individual tax consultations. We can show you the tax impact of direct investment, mutual funds, 401K, pension or annuities. Consider both the contribution and distribution. We sell no product, so our advice is impartial. This service is especially important to individuals who are just entering retirement. With a little tax planning a soon to be retiree can save thousands in taxes. Don't be pennywise and pound foolish, set up a separate consultation if you will have significant tax changes in the near future.

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ITEMIZED DEDUCTIONS, EXPENSES, CREDITS, AND SPECIALTY ITEMS

✓ **MEDICAL** ***Must exceed 10% of AGI, 7.5% if 65 or older***	
Bring itemized list of Medical Expenses	

✓ **TAXES**	
Real Estate Taxes Main Home	
Real Estate Taxes Second Home	
Property Tax Refund from Last Year	
Auto License *(Less $35 base fee per auto)*	
Sales Tax	

✓ **INTEREST EXPENSE**	
Home Mortgage *(Bring 1098's)*	
Second Mortgage, RV or Boat Loan	
Line of Credit	
Points *(Paid on purchase or refinance)*	
Investment Interest Expense	
Student Loan Interest	

✓ **CONTRIBUTIONS**	
Receipted Contributions *(Church, Temple,etc)*	
Petty Cash and Miscellaneous	
Goods *(If more than $500, bring list)*	
Charitable Mileage	

✓ **MISCELLANEOUS (Must exceed 2% of AGI)**	
Tax Preparation and Consulting	
Union and Professional Dues	
Safety and Protective Equipment	
Uniforms	
Tools and Supplies	
Cell Phone and ISP	
License and Recertification	
Training and CEU's	
Meals and Entertainment	
Mileage or Auto Expense	
Liability and Malpractice Insurance	
Subscriptions and Professional Journals	
Job Search	
Travel and Passport *(If used for work)*	
Safe Deposit Box	
Travel	
Business Cards	
IRA Custodial Fees	

Business Use of Home or Rental Property
- Total Square Footage of Home
- Business use Square Footage
- Utilities *(Water, Electricty, Trash, etc)*
- Homeowners Insurance
- Repairs
- Major Improvements
- Mileage

✓ **SCHOOL AND EDUCATION**	
KG-12 School Tuition	
KG-12 Enrichment *(Dance, Band, No Sports)*	
KG-12 Supplies	
KG-12 Computer Expense	
College and Secondary Education Tuition	

Bring 1098-T'*s. Books and supplies are deductable if they must be paid to the institution as a condition of enrollment. The first two years qualify for the American Opportunity Credit then the Lifetime Learning Credit applies.*

Educator and Teacher Expenses	

✓ **RETIREMENT CONTRIBUTIONS**	
Traditional IRA Contributions	
Roth IRA Contributions	
SEP or Keogh	
Health or Medical Savings Account	
401K contributions are listed on W-2's	
Other	

✓ **DAY CARE**	
Daycare Expense	

Bring providers name, address, and SS# or Federal ID number. This information ***is required*** *even if you participated in a pre-tax spending account.*

✓ **SPECIALTY ITEMS**	
Energy Credit Items (Solar & Electric Cars)	
Casualty Losses *(Must exceed 10% AGI)*	
Military Combat Zone Credit	
Alimony Paid *(Bring recipients SS#)*	
Gambling Losses *(Only up to winnings)*	
Adoption Expenses	
Moving Expenses are no longer deductible	
Other	

You can receive a $120 credit for each month of service in a Combat Zone. Bring copies of your DD-214's

✓ FREE AUDIT OR INQUIRY HELP

While your chances of a full blown audit are very rare, adjustment or correction letters are very common. If your return is audited or adjusted, please call us. Our assistance is free. If you receive a written notice of inquiry, adjustment, or correction please fax or send us a copy. Even if you agree with the changes, sending us a copy allows us to update your file. If your federal return is adjusted your state return will probably have to be amended as well. PAC does NOT pay either the penalty or interest on corrected or amended returns. **DO NOT PAY ANY BALANCE DUE FROM AN ADJUSTMENT OR CORRECTION LETTER WITHOUT CONTACTING US FIRST!**