

J&A INCOME TAX

ARE YOU MISSING OUT ON DEDUCTIONS? 2017 CHECKLIST

INCOME

- W2 and 1099 Forms
- Dividends & Interest
- Sales of Stock
- Social Security
- Unemployment Comp
- Pension, IRA, Annuities
- Self Employment
- Rental and Royalty
- Partnership and S-Corp
- Estates and Trusts
- Gambling Winnings
- Alimony Received
- Sales of Property
- Sale of Residence
- Child Support Received*
- Workmen's Comp*
- FIA Cash Benefits*

*Not taxable, but may be needed for state credit.

ADJUSTMENTS AND CREDITS

- HSA Contributions
- Moving Expenses
- Alimony Paid
- IRA Contributions
- Students Loan Interest
- Day Care Expenses
- College Tuition, Books and Related Fees
- Educator Expenses

ITEMIZED DEDUCTIONS

MEDICAL*

*A portion may be deductible if total medical expenses for 2016 exceed 10.0% of your adjusted gross income.

- Insurance Premiums
- Dental and Doctor
- Optical
- Qualified Medical Home Improvements
- Medical Miles Driven
- Long Term Care Ins.

TAXES

- Primary residence
- Second Home
- Vacant Property
- License Plate Fees State Sales Tax*

*Deductible if sales tax paid is higher than state tax withheld from W2, 1099 or Estimates

CHARITABLE

- Cash and Check
- Non-Cash (clothing etc.)
- Church Tithes
- Volunteer Miles Driven.
Please bring in proof for any contribution over \$250

INTEREST

- Mortgage
- Equity Loan
- Qualifying Boat or RV Interest, Investment

MISC. DEDUCTIONS

*Expenses in this category are partially deductible if the amount claimed exceeds 2% of adjusted gross income. These items include, but are not limited to:

- Union Dues
- Uniforms
- Professional Dues
- Tools and Equipment
- Safety Gear
- Tax Prep Fee
- Business Mileage
(54 cents per mile)
- Safe Deposit Box
- Investment Expenses
- Qualified Meals
- Job Hunting Expenses
- Deductible when seeking a new job within the same line of work.

Expenses include travel, employment agency fees, resume, etc. Gambling Losses* *Only to the extent of winnings claimed as income

\$25 OFF

Tax prep of Federal & State
with coupon exp. 4-17-18

**NEW
CLIENTS**