**Taxteck Accounting Inc.**

**DBA. Tax4less**

**3004 S Miami Blvd. Durham NC 27703**

[**www.tax4less.org**](http://www.tax4less.org) mytaxteck.com or [**www.taxteckforless.com**](http://../../../../../../AppData/Local/www.taxteckforless.com)

[**bpt1040@gmail.com**](mailto:bpt1040@gmail.com) **or** [**bp@tax4less.org**](mailto:bp@tax4less.org) **[Do NOT send to bp@1040.com]**

* Prior year clients can/may add only the **changes/Updates**
* Leave blank or write N/A if some of the fields don’t apply to you
* Employee expense, moving expenses etc. no more deductible from 2018!

TP First Name  Last Name

Occupation  Filing Status

Date of Birth SSN/ITIN

Email ID  Cell #

Home #  Work #

Address:

***School district******for NJ/NY/PA/OH/MI/IN/VA Residents must fill up***

**D/L …or StateID… or P.P No … Issue Dt Expiry Dt… ID State/P.P.Country**

**Spouse Details**

First Name  Last Name

Date of Birth **Occupation**  SSN/ITIN

Email ID  Cell No .

**D/L …or StateID… or P.P No … Issue Dt Expiry Dt… State name**

**If no D/L: Passport No….. , issue dt….. , expiry dt. ….**

**Child / Dependent . Male/ Female**

First Name  Last Name

Date of Birth SSN/ITIN

**Child / Dependent Male/ Female**

First Name  Last Name

Date of Birth  SSN/ITIN

**Child care / Dependent care fees paid** [EIN/SSN of the care provider with address & Phone No]

Amount Paid $ … EIN/SSN Phone No

Institution / Name …. Address etc. [ check Box no 10 of your W2 for flex spending- if any]

**TP/ SP Residency immigration Status:**

**Bank Details**

Routing # Account #

Bank Name:

Credit card info [if you are paying preparation fees with your credit card] option- Zelle Paypal Check

**Important Note:**

1. HEALTH INSURANCE details: H.C fully covered or not? Provide **1095A** form [for Obama care-If applicable]: Collect the 1095A form from the **Market place insurance**
2. HSA- Health Saving Account stat **1099SA** – **Refer** code W in **W2** box **12. Print out 1099SA from staff portal.**

If you have a Code “ W “ in you W2 box no 12a- 12d, Pls get the 1099SA stat from your Staff HSA Account

Stimulus amount received in Summer of 2020 $ -- ----

Stimulus amount received in December 2020 / January 2021 $-- ----

* **Income List**

1. W2, Salaries and Wages
2. **1099** Misc. Miscellaneous income:
3. **1099 INT** or **DIV** [if you have $10,000 deposit overseas anytime during **2017**, you may have to file **FABR**]
4. **1099G**, Unemployment:
5. **1099 SSA** Social security wages
6. **1099R** Retirement / pension Annuities, rollovers
7. **K1** Business income: from LLC or 1120S etc.
8. **1099C** & **1099A** Cancellation of debts. Gambling Lottery:
9. **1099B** Stock statements- if any stock sales done during **the year**  (Document will be attached)
10. Crypto currency statement in Purchase dt. purchase Price ; Sale dt. Sale price: Excel sheet needed
11. College tuition-**1099E** / college books, Student loan interest **1098E** [college/univ address with EIN]
12. Prior year State refund received [1099-G] **if itemized in previous year:**
13. Gambling win/loss, Lottery: **None**
14. **Primary home sale Dt of Purchase & price Sale dt and price + Expenses of sale – Hud needed**

**EXPENSES FOR ITEMISING**:

1. Property taxes paid – home
2. Car taxes paid to county/ tag renewal
3. Medical expenses, Direct Health Insurance payment, co pay etc. up to 7.5- 10% limitation
4. Charity / contributions [USA only] 501c (3): (Church and other Not for profits)
5. Mortgages paid **1098:**
6. Home Mortgages [**1098T**], Car Taxes paid to county
7. Gambling loss limitation subject to itemization
8. HUD Statement for all new homes bought

**College tuition Credit**

**1098 T from University / School, Any School related expenses books, computer etc**

**Profit or Loss on sale of properties /Assets**

**Rental property Income [ TP/SP income limitation 150K]:**

**Rental expenses listing mortgage interest , taxes , insurance, HOA, repairs, auto , utility etc.**

Traditional IRA contribution for current year:

HSA contribution [self/family] :

FBAR must be filed by all filers those who have foreign deposit/financial assets of $10000 or more:

File at https://bsaefiling.fincen.treas.gov

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