



Abundant Returns Tax Service
3781 Presidential Parkway, Suite 117
Atlanta, GA 30340
770-451-6330 ♦ Fax: 770-451-6391
♦ www.abundantreturns.com ♦

Our Mission:
***“Keep More Money in
Your Pocket!”***

Income Tax Filing Information

Important Tax Documents

(Gather these documents in order to file your taxes.)

(W-2) Income from Employers
(W-2G) Gambling Winnings

(1098) Mortgage Interest Statement
(1098-E) Student Loan Interest
(1098-T) Tuition Statements

(1099-A) Acquisition or abandonment of secured property
(1099-B) Stocks, Bonds, Bartering
(1099-C) Canceled Debt
(1099-DIV) Dividend Statement
(1099-G) Unemployment Compensation/State Tax Refunds
(1099-INT) Interest Statements
(1099-LTC) Long Term Care Benefits
(1099-Misc) Miscellaneous Income
(1099-Q) Qualified Education Program Payments
(1099-R) Pension/IRA/401(k) Distributions

(1099-S) Real Estate Sales
(1099-SA) Health Savings Accounts
(K-1) Shareholder's Share of Income from Partnerships, LLCs or S-Corporations

Alimony
Childcare Fee Statements
Donation Receipts & Statements

IRA Deposits & Withdrawals
Rental Property Income
Settlement Statements (Purchase or Sale of Property)
Social Security Benefits Statement
RailRoad Benefits Statements
Veterans Benefits Statement

Any statement you received that says
“Important Tax Document”

Medical Expenses

Insurance (*Out-of-Pocket & Withheld from paycheck*)

Co-Payments
Prescriptions/Birth
Control/Insulin & supplies
Glasses/Contacts & Solution
Hearing Aids & Batteries
Medical/Dental Exams
Eye Exams
Mental/Physical Therapy*
X-Rays, Labs, Clinics*
Braces/Dental Work
Crutches/Wheelchairs
Orthopedic Shoes
Guide Dogs & their care

Laser Eye Surgery
Ambulance Service
Mileage to/from Medical Care
Parking & Tolls
Acupuncture/Chiropractor
Artificial Limbs and Teeth
Lodging while away from home for treatments
Nursing Help
Hospital Care (*Including Meals & Lodging*)
Long Term Care Services
Stop Smoking Programs & Prescriptions*

Weight Loss Programs for specific disease*
Medical Center Treatment for Drug/Alcohol Addiction
Special Schools & Transportation for physically/mentally handicapped
Hand Controls for Car
TTY Equipment/Installation
Oxygen Tanks & Equipment

*(*Must Be ordered or prescribed by Doctor)*

Donations

Cash/Check (ex: Church, Feed the Hungry, etc)
Payroll Deduction (ex: United Way, Red Cross)
Charitable Mileage
Other Charitable Costs
Appraisal fees to determine the value of Donations

Non-Cash Items (ex: Clothing, Furniture, Food)
Date of Donation
Non-Profit Organization Name
Address
Items
Value of Items

Other Deductions

State Tax Payments (<i>Other than thru your job</i>)	Licenses/Permits	Safe Deposit Box
Estimated Taxes paid	Uniforms/Protective Gear	Professional Magazines
Real Estate Taxes	Boots/Gloves/Safety Goggles	529 Plan Contributions
Car/Boat Tags	Uniform Maintenance (<i>Cleaning, Alterations</i>)	Loans made to family/friends that have not been repaid
Motorcycle Tag	Tools required for job	Job Search
Educational Expenses	Continuing Education	Resumes/Printing
Roundtrip Mileage to Class	Income Tax Preparation	Mileage (for interviews)
Books/Software	Name of Child Care Provider	Employment Agency Fees
Testing Fees	Address	Mailing Expenses
Tuition	Tax Id or SS#	Faxing Charges
Mortgage Interest & Points	ChildCare Fees Paid	Travel
Union Dues	Investment & Broker Fees	Research
Professional Association Fees	Internet Trading Fees	
	Legal Fees/Advice	

Moving Expenses

(*Must be More than **50 Miles** in connection with Job)

Date of Move	Mileage: old home to old job
Old Home City	Packing Materials
New Home City	Hotels
Truck Rental	Moving Company Fees
Amount Employer Reimbursed	Storage
Mileage: old home to new job	

Rental Property

Each property's expenses must be listed separately.

Date Purchased	Fence	Moving Expenses for
Purchase Price	Filing Fees	Equipment/Appliances
Property Address	Fire Extinguishers	Office Supplies/Books
Date Sold	Floors	Office Rent
Selling Price	Furniture	Painting
Date Rented	Item	Pest Control
Rent Received	Date of Purchase	Plants/Flowers
Advertising	Cost	Plumbing
Appliances	Homeowners Association	Points
Item	Fees	Refinance Charges
Date of Purchase	Installation Fees	Rent Received
Cost	Inspections	Rent Collection Costs
Appraisals	Insurance	Repairs
Assessment Fees	Investment Counseling Costs	Roof
Blinds/Curtain	Lawn Maintenance	Sanitation
Bookkeeping	Leasehold Improvements	Salaries
Carpet	Lease Preparation	Security System
Cleaning Service	Legal Fees	Smoke Alarms
Cleaning Supplies	Maintenance	Stationery & Supplies
Closing Costs	Major Improvements	Supplies
Commissions	Management Fees	Taxes
Contractor Fees	Mileage	Tax Counseling
Decorating Costs	Misc. Items (Light Bulbs, Door	Tax Return Preparation
Deposits	Knobs, Faucets, etc)	Traveling Expenses
Electrician	Mortgage Interest	Utilities

Self Employment/ Business Deductions

Income	Filing Fees	Sanitation
Accountant	Faxing Charges	Security System/Alarms
Advertising	Freight	Software
Business Cards	Furniture Purchased	Storage
Flyers/Posters	Item	Supplies
Stationery	Date Purchased	Taxes
TV/Radio	Cost	Federal
Telephone Directory	% of Business Use	State
Newspaper/Magazine	Furniture Rental/Lease	Employer
Billboards/Signs	Gifts to Customers	Payroll
Internet Banners/etc.	Gifts to Employees	Business Property
Specialty Items (Pens, Cups, Magnets, etc)	Gifts to Other Businesses	Sales
Answering Service	Graphic Design	Tax Counseling
Auto Expenses:	Insurance	Tax Preparation
Business Miles	Liability	Telephone
Commuting Miles	Disability	Office
Personal Miles	Errors & Omissions	Cellular
Total Mileage for the year	Health	Travel
Monthly Payment	Life	Air Fare
Total Cost of Vehicle	Malpractice	Cab Fare
Make, Model & Year	Workers Compensation	Hotel
Date Business Use Began	Information Services	Tools
Parking/Tolls	Internet Service/DSL	Utilities
Gas/Oil	Interest on Business Loans	Electricity
Car Washes/Waxes	Inventory	Gas
Insurance	Janitorial Service	Sanitation
Garage Rent	Licenses/Permits	Water
Tires/Accessories	Legal Fees	Cable (Commercial Office Only)
Repairs	Magazine/Newsletter	Uniforms
Inspection/Registration	Subscriptions	Purchase
Taxes	Mailing Lists	Cleaning/Maintenance
Banking Fees	Marketing Promotions	Website/Web Hosting
Billing Service	Market Research	Wages
Bookkeeping	Meals & Entertainment	Home Office — <i>Complete this</i>
Bonds (Surety, Fidelity, etc)	Mortgage Interest (Purchase of	<i>Section only if your office is</i>
Catering	Business Building)	<i>located in your home.</i>
Check Validation Service	Music System (in Office)	
Commissions	Music (CDs/Tapes)	Total Sq. Footage of Home
Consultant Fees	Office Supplies (Ex: Paper,	Sq. footage of Office Area
Contractors	Pens, Ink, etc.)	Monthly Rent
Courier Service	Payroll Service	Mortgage Payment
Credit Card Terminal Rental	Pension Plans	Utilities
Credit Card Service Fees	Profit Sharing	Electricity
Delivery Charges	Employee Benefit Programs	Gas
Decorating Expenses	SEP	Water
Donations	401(k)	Garbage
Drinking Water	Cafeteria Plan	Repairs to Home
Books	Postage	Repairs to Office Space
Classes/Seminars	Post Office Box	Home Owners Insurance
Workshops/Conferences	Professional Services	Association Fees
Equipment Purchases	Prof. Association Dues	Security Alarm Service
Item	Pager	Decorating/Painting Art/Plants
Date Purchased	Printing	Total Cost of Home
Cost	Prizes	Date Business Use Began
Equipment Rental/Lease	Referral Fees	
	Rent (Office Space)	