

BLIZZARD BUSINESS SERVICE, INC
Interview Items To Bring

INCOME ITEMS:

- 1) Bring all Forms 1099 & W-2 that report interest, dividends, oil leases, wages and other income or payments received. Your return cannot be processed without these forms.
- 2) All Form K-1's, if any, reporting net income or loss. Do not delay your appointment if you have not received all information from K-1 investment income.
- 3) Closing statements for land, buildings and/or equipment purchased, sold or exchanged Including condemnations. List the cash cost of other business assets and the date acquired if you are not on a computer schedule of depreciation.
- 4) All papers for any deed-backs of assets or transfers of assets to lenders in settlement of debts, for discharge of debts or any loans forgiven in 2019.
- 5) Information about any other income, taxable or not (including pensions, unemployment, social security, inheritances, and/or lawsuit settlements). Know if your pension is a deferred compensation, 401K, etc.
- 6) The name, address and social security number for any individual paying you mortgage interest.
- 7) All information about crypto currency transactions

DEDUCTIONS AND CREDITS:

- 1) Health insurance and long term nursing care insurance paid. Form 1095A, B or C if received.
- 2) Information for charitable organizations (cash and non-cash); if non-cash bring receipts.
- 3) List of expenses relating to your business if not on a record keeping system.
- 4) For use of an office in your home (for business) list the home's total square feet and square feet used exclusively for business use; list total utilities, insurance, mortgage interest and repairs pertaining to business area. This is not necessary if the information has not changed from last year.
- 5) All property tax receipts for 2019 (paid or unpaid) . Don't forget your summer taxes. If enrolled in PA116, bring any new agreements or extension requests. If you have extended, amended (split) or newly enrolled any parcel, bring a copy of the new agreement.
- 6) If you pay child care you will need the name, address and social security or employer ID number of the care provider, not the state ID number for the day care.
- 7) If you pay rent you will need the name and address of the landlord and the amount paid.
- 8) HSA/FSA year end statement and Form 1099-SA
- 9) Home mortgage interest must be allocated to its use. If you did a re-fi and some of the proceeds were not used for the original purchase of your home, we will need to determine how much will be deductible.

OTHER:

- 1) Copies of any correspondence with the IRS or State regarding prior return adjustments/audits.
- 2) For e-filing, bring a check or savings information. Deposit tickets will not be accepted.
- 3) College tuition expense (form 1098-T).
- 4) If in doubt, bring it!

NEW CLIENTS ONLY:

- 1) Copies of your income tax returns (federal and state) for 2018; also 2016 and 2017 if you have filed Schedule C or F or are a partnership, corporation or LLC..
- 2) Please bring the social security cards of all dependents (including self/spouse) you will be claiming to avoid any problems with your exemption. If the name (spelling) and number do not match exactly on your return, you may be denied the exemption. You will also be asked to provide a driver's license or state ID card.