

INCOME TAX PREPARATION

Please be aware that our tax preparers are not tax accountants; they are active duty or retired personnel who have taken a short course in BASIC tax preparation and as such, are not prepared to do complicated tax returns. If you have extensive investments, a sizeable personal business, limited partnerships, foreign investments, casualty or theft losses, you will be referred to a paid preparer, UNLESS you have made prior arrangements with a specific tax preparer to do your return. If you have a question about this, call the tax center at 937-656-1423.

We WILL NOT do married filing jointly versus married filing separately comparisons. We can only give you a general idea of what the difference will be.

If you sold stock, bonds, or mutual funds, you MUST have the cost basis for the sale. This is the total cost, with dates of all purchases, reinvested dividends, and sales. Contact your broker if you don't have this information. If you have more than 20 separate stock or bond sales we may send you to a paid preparer as we probably cannot complete your tax return within the allotted time.

IF YOU DON'T SHOW UP FOR YOUR APPOINTMENT, YOU CANNOT RESCHEDULE ANOTHER APPOINTMENT. You should arrive at the tax center AT LEAST 15 minutes prior to your appointment to fill out required paperwork. We have allotted 90 minutes for each appointment as it will usually take that long to complete your federal and state returns. Complicated returns or returns with multiple states involved will take longer, so you may have to schedule two consecutive appointments. If you want us to prepare a dependent's return in addition to your return, you MUST schedule a consecutive appointment for each dependent.

We are located in Area A, Bldg 70, next to the ROTC entrance, on Schuster Avenue. Please enter Bldg 70 through Door 6.

WHAT TO BRING TO YOUR TAX APPOINTMENT:

TAX RETURNS

2013 federal, state, and local tax returns

PERSONAL DATA

Social Security numbers, including spouse and children. Please bring actual cards or SSAN verification letter. We cannot complete your return without SSANs or ITINs. Bank routing number and account number if you want a direct deposit of refund or payment of amount owed.

EMPLOYMENT AND INCOME DATA

W-2 Forms

Alimony received

Jury Duty pay

Gambling and lottery winnings and losses; Form W-2G
Scholarships and fellowships
Tip income
Annuities
Self-employment income and expenses, 1099 MISC
Retirement, pension, or IRA distributions; Form 1099-R Social Security; Form SSA-1099
Prior year state and local tax refunds; Form 1099-G
Unemployment compensation; Form 1099-G Interest; Form 1099-INT and 1099-OID Dividends; Form 1099-DIV
Proceeds from broker transactions; Form 1099-B and capital gains
Rental income and expenses, including depreciation
Business income and expenses (\$5000 limit on expenses), including vehicle mileage (personal and business)
Schedule K-1 from partnerships, estates, or trusts
1099-C Cancellation of Debt and/or 1099-A Acquisition or Abandonment of Property

DEDUCTIONS (not itemizing)

Alimony paid (need recipient's Social Security Number)
Education expenses: student loan interest, tuition, books, fees, supplies and equipment Child and dependent care expenses, including provider's tax ID or SSAN, and address IRA (ROTH and traditional), Keogh, 401-K, and other retirement contributions Unreimbursed moving expenses
Residential energy credits Adoption expenses Medical/Health savings accounts
If you have large medical/dental expenses but you don't have enough deductions to itemize on your federal return, expenses exceeding 7.5% of your adjusted gross income may still be deducted on the OHIO form.

SCHEDULE A – ITEMIZED DEDUCTIONS

Above data, plus:

Medical and dental expenses and health insurance. Expenses exceeding 7.5% of Adjusted Gross Income are deductible.

State and local income taxes OR general sales tax. Taxes paid on a new or used automobile, motorcycle, motor home, airplane or boat may be deductible.

Real estate taxes

Personal property taxes

Home mortgage interest and points; Form 1098

HUD-1 closing statement if you purchased or refinanced a home in 2013

Private mortgage insurance, if home purchased after 2007

Cash gifts (charitable contributions). Must have written proof of gift.

Non-cash gifts (charitable donations). If over \$500, you must have an itemized list and be able to substantiate date of purchase, purchase cost, and value for each item.

Vehicle mileage for charity work

Unreimbursed employee expenses—military moving expenses, job travel, union dues, job education, subscriptions, job hunting expenses, etc.

Tax preparation fees, including credit card convenience fee to pay taxes

Other expenses – investment, safe deposit box, etc.

NOTE: Total unreimbursed employee expenses, tax preparation fees and other expenses must exceed 2% of adjusted gross income to be deductible.

OTHER DOCUMENTS

Prepaid federal, state, and local tax vouchers. Need date paid and amount.

Schedule D worksheet for capital loss carryover from previous year(s)

Divorce decree or separation agreement involving custody of children or payment of taxes

Power of Attorney if spouse is not available to sign