

**Age 55+ Special**  
**COMPLETE TAX PREPARATION**

**\$89.95**

**Call for an appointment  
before our books fill up!**

**Tax Preparation  
Special!**

**A \$350  
VALUE**

Scan to book  
Appointment



**Call for Appointment  
(317) 288-0634**

- One Year Intro Rate
- Personal Tax Returns Only
- Federal & State Tax Prep and Filing

- Sch. A - Itemized Deduction, Sch. B - Interest & Dividends  
Income, and Sch. D - Capital Gains & Losses
- E-filing & Direct Deposit

## Tax Preparation Checklist:

To help you prepare for your tax appointment, we've created a checklist to assist you gather your info and docs.

### Personal Information

- A copy of last year's filed income tax return
- SSN and DOB for you, spouse and all dependents
- Identity Protection PIN, if one has been issued to you by IRS
- Bank routing and account number to receive refund (if any) via direct deposit

### Sources of Income

- Form W-2, Employment income for you and your spouse
- Form 1099-G, Unemployment income
- Form 1099-NEC, and 1099-MISC Contractor and Self-Employment income
- Form 1099-K, Income from third-party payment processors (i.e. PayPal, Venmo, e-Bay, Amazon, etc..)
- Form K-1, Income from Partnerships and S-Corps
- Form W-2G, Gambling income
- Form 1099-C, Cancellation of debt
- Business or farming income, Profit & Loss statement and capital equipment information
- Rental income and expenses broken down by property

### Retirement Income

- Form 1099-R, Pension/IRA/Annuity Income
- Form SSA-1099 & RRB-1099, Social Security Income and RRB Income

### Investment Income

- Form 1099-DIV, Dividend Income
- Form 1099-INT, Interest Income
- Form 1099-B & 1099-S, Income from sale of stock and other property
- Form 1099-SA, Distributions from Health Savings Accounts (HAS)

### Deductions & Tax Credits

- Form 1098-Mortgage
- Real estate property taxes
- Charitable donations to tax-exempt organizations (Cash and other-than Cash)
- Out-of-pocket medical and drug expenses
- Form 1095-A, Insurance marketplace (Exchange)
- Form 1098-E, Student loan interest
- Form 1098-T, Tuition paid to educational institutions
- Dependent care expenses paid to licensed day care centers and care providers

*Note: This is not a comprehensive list and other information might be needed based on each client's situation.*