

2016 Tax Folder: Enclose Your Pertinent Annual Documents for Your 2016 Tax Return, and Enclose ALL Back-up Tax Info as Well

Don't Forget!

Tax Return Deadline: 4/18/17
Extension Deadline: 10/16/17
New: Partnership Deadline: 3/15/17
Partnership Extension Deadline: 9/15/17

Information Returns

We recommend that you use efile4biz.com to electronically file 1099s. We can provide blank 1099s and 1096s upon request. **The new filing deadline is January 31st!**

Quarterly Estimates

A major source of errors. *We need the actual amount and date paid for each quarter.*

Incorrect quarterly amounts **delay** tax refunds and guarantees government correspondence.

Automobile Expenses for Business

- Odometer Reading: On 12/31/2016, please write it down or take an odometer picture.
- Keep each auto separate.
- Auto Interest: Call your finance company and get the amount.

Organizer

- Use it! (As a guideline, at least.)
- You do not need to input your W-2 information. We need to see the actual W-2s.
- You do not need to input Interest, Dividends or Sale of Stock from your 1099s and 1099Bs. We need the actual statements in their entirety.

Travel Meals

Keep separate, as we can only take 50% and also tally the number of days away.

Rental Property Owners and Home Office Businesses

Please itemize, itemize, Itemize all repairs and capital improvements as much as you can.

Documents not to forget:

- Purchase, Sale, or Refinance Escrows
- Purchase or Lease on a new vehicle
- Non-Cash Contribution Receipts
- General Ledger with your Profit and Loss Statements (or at least have it available online)
- Mortgage Interest Form 1098s. **We now need a copy of the actual document!**
- Expense statements. Please print them; we need on paper, not just on your computer screen.

