Apple Financial Services

4029 Ridge Top Rd
Fairfax, VA. 22030

Wealth Management * Insurance * Tax Preparation

It’s Tax Time

Below is a list of reference items that you should bring to our appointment.

- Form(s) W-2 for wages and salaries
- Forms(s) 1099 for interest, dividends, pensions, real estate proceeds, sales of securities, IRA distributions and other miscellaneous income
- Form(s) 1098 for interest paid on education loans, tuition payments, mortgage interest, etc
- Schedule(s) K-1 for partnerships, estates, trusts, S-Corporations, Limited Liability Corporations
- Closing statements from the sale or purchase of property
- Medical bills, tax bills, charitable contributions and other itemized deductions
- Long Term Care Insurance Premiums
- For Day Care Expenses bring name, address and tax ID# of provider
- Record of federal and state tax estimated payments made in 2007
- If you installed energy efficient windows, doors, equipment, etc. bring your Manufacturer’s Certification Statement for Residential Energy Credits
- If you purchased a hybrid automobile bring the manufacturers certification
- Any tax notices sent to you by the IRS or other taxing authority

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Tax Deduction Worksheet

Medical Expenses (Medical expenses that exceed 7.5% of adjusted gross income are deductible. Call for Medical expense worksheet if you think you have deductible medical expenses.)

Long Term Care Insurance Premiums Taxpayer________________________

Spouse ________________________

Personal Property Taxes (auto) __________________________

Charitable Contributions cash __________________________

Charitable Contributions non-cash __________________________

Child and Dependent Care Expenses __________________________

Provider Name __________________________

Provider Address __________________________

Provider Tax ID# __________________________