**GIACOBAZZI’S INCOME TAX, INC**

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**Suggested List of Documents to Bring to Appointment:**

**NEW CLIENTS NEED TO BRING:**

* COPY of Last 2 years Tax Returns Current Driver’s License for each Taxpayer
* Social Security Cards or Copy for everyone Voided Check for E-Filing Direct Deposit

**All Clients should bring:**

TOTAL INCOME ORIGINAL DOCUMENTS

* All W-2’s / 1099’s/ Social Security/ Pension Statement
* Business Income
* 1095 A Marketplace Insurance (if Applicable)
* Farm Income
* Interest Statements
* Unemployment Income
* Gambling Winnings
* Rental Income

**IF ANY OF THESE APPLY TO YOU**

* Real Estate Tax Statement PAID for State of Illinois deduction.
* Stock Sales
* IRA Distributions
* All Rental Property Information Expenses HUD1 if Purchase / or Sale
* Total Business Expenses Categorized and Totaled
* Equipment Purchases or Sales with DATES of Purchase or Sale
* Business Vehicle Mileage Records Total Miles for Year/ Total Business Miles / Personal Miles
* Day Care Expenses Statement with Name Address FEIN or SS # and Phone #
* Any IRS or State Letters you received.
* OFFICE IN Home Total Square Ft of House and Sq. Ft of Business Area Total of Utilities, Insurance, Real Estate Taxes…

**Items to bring but that may not be deductible due to increased Standard Deduction:**

* Mortgage Interest
* Invoice for Car Purchase or Large Ticket items Boat Motor Home(sales tax)
* Medical Expenses start at 7% of Adjusted Gross Income Vision Dental Prescription Doctor Hospital mileage
* Charitable Contributions / Good Will / Gambling Losses
* Not deductible 2018-2025 Miscellaneous items subject to 2% AGI (Union Dues, Clothing, Tools, Mileage, Job Search/Expense, Tax Pres Fees etc.)