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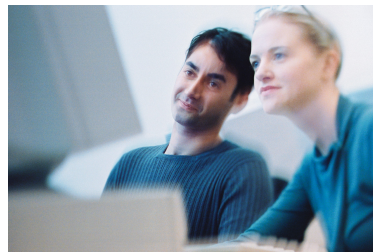
Any questions or comments
should be directed to your tax
advisor. This publication is
not meant to take the place of
a qualified tax advisor.

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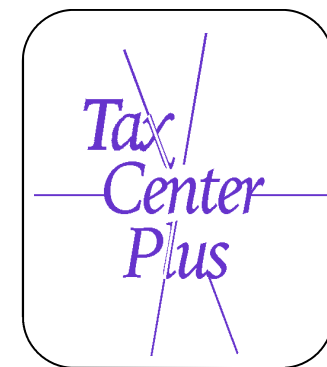
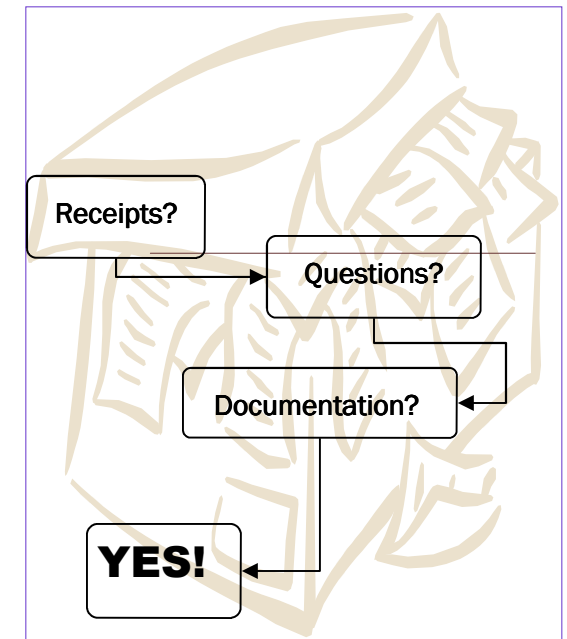
Visit our website for informative
topics and help links such as the
following:

- Electronic filing
- Worksheets
- Fees
- FAQs
- Updates and changes of tax laws
- Our professional staff
- IRS website
- Mortgage loans



www.taxcenterplus.com

What should I bring to
my tax appointment?



Be Prepared

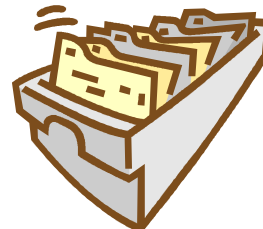
Start preparing early for your tax appointment. Compile a list of the documents you expect to receive based on last year's statements and this year's activities. Collect information in a file during the entire year.



Being prepared can help you and your preparer. Contact your tax advisor early to reserve a convenient time for your appointment. Choose a time when you expect to have all the necessary documents. The return can be done more accurately and in a shorter period of time if all of the information is available at the initial appointment. If you're not sure whether you should be receiving a certain document, contact your tax advisor to discuss it before coming into the office.

Items to Bring:

- Wage and Income statements. Include W-2s (received from employer), pension statements, social security statements and 1099 forms.
- Any other income received. K-1 statements, stock sale, sale of real estate or
- Business owners and farmers need to bring accurate records of the income they have taken in during the year. Records of expenses such as inventory, supplies, business equipment and any other business expenses are essential. Payroll records may also be necessary.
- Child care information. This includes name, address and identification number of the child care provider as well as the amount of the expense.
- Moving expenses. Records are needed for those who have un-reimbursed job related moves of more than 50 miles. The cost of the move includes transportation of good and the family to the new location. Lodging during the move is also allowed.
- Un-Reimbursed job expenses. These can include mandatory work supplies not provided by the employer, mileage while taking care of business related matters and/or union dues.



- Social Security Numbers. You will need Social Security numbers of all dependants and filers.
- Divorce Issues. For divorces after 1984, the non-custodial parent will need Form 8332 or other similar statement, signed by the custodial parent, in order to claim a child as a dependent.
- Medical Expense Documentation. Medical expenses are deductible only if they exceed 7.5% of your adjusted gross income. However, mileage to and from the doctor's office, as well as co-payments, prescription drugs, doctor, dental and hospital bills, and insurance premiums are included.
- Interest Paid. Interest paid on a mortgage or home equity loan may also be deductible. Student loan interest is also deductible.
- Charitable Contributions Receipts Charitable contributions are a good source of deductions. Any one-time gift of \$250 or more requires a receipt.



If this is your first visit to

Tax Center Plus, bring a copy of last year's tax return. This will help us prepare a thorough return for you.

For an
appointment call us
at (509) 736-2400.