

**Cronier Tax Service**

**Hours of Operation**

Mon -Fri 9AM – 8 PM  
Sat 9 AM – 5 PM  
Sun 2 PM – 5 PM

(228) 475-4602 (Office) (228) 475-9638 (Office)  
(251) 865-4836 (Office) (251) 865-1697 (Office)

(888) 510-3038 (Fax)

(228) 475-4026 (Deer Creek)

(228) 588-2843 (Allen’s Home)

(228) 627-5945 (Allen’s Cell)

Email: [allen.cronier@croniertaxservice.com](mailto:allen.cronier@croniertaxservice.com)

Website: [www.croniertaxservice.com](http://www.croniertaxservice.com)

Dear Client,

We continue to offer free electronic filing.

Allen, Ginger, Janette, Rachel, and Tammie are the accountants. We look forward to seeing you in the very near future. Call for your appointment. When making your appointment, please let us know if you have more than one tax return to be prepared. For your convenience, we accept Check, VISA, MasterCard or American Express. **Also offering Fee Collect for an additional \$25.00 Bank Fee to deduct your tax preparation fees from your Refund.**

- Has your mailing address changed?
- Dependents - Bring SSN for each.
- Are any dependents in college?
- Income - bring all W-2's, 1099's, social security statements, gambling winnings, and miscellaneous income.
- Did you receive any unemployment?
- Did you pay estimated taxes last year?
- Interest income? All 1099-INT and OID.
- Dividend income? Provide all 1099-DIV.
- Retirement plan distribution Form 1099R?
- Lump Sum Distributions?
- Cancellation of debt IS considered income. Please bring amount and reason debt was cancelled.

**UPDATE: If you are claiming the Earned Income Tax Credit, Refunds will be held until February 15<sup>th</sup> per IRS PATH Act. However, returns can still be filed and submitted starting January 28th.**

**Standard Deduction for 2018 tax returns are:**

- Single \$12,000
- Head of household \$18,000
- Married filing jointly \$24,000
- Married filing separately \$12,000

**If you have any of the following, please bring them with you:**

**MEDICAL EXPENSES PAID** (Must exceed 7.5% of your Adjusted Gross Income)

- Medical/dental insurance premiums (if premiums were not pre-taxed) \_\_\_\_\_
  - Long term care insurance/payments \_\_\_\_\_
  - Prescription drugs \_\_\_\_\_
  - Doctor and dentist visits (not reimbursed by insurance) \_\_\_\_\_
  - Hospital, nursing care \_\_\_\_\_
  - Glasses, hearing aids, batteries, etc \_\_\_\_\_
  - Auto travel/miles (for medical purposes) \_\_\_\_\_
  - **Rate: 18 cents/mile**
- Reimbursements from FSA accounts cannot be claimed again on your return.

**TAXES PAID**

- Real estate (home, land & other property) \_\_\_\_\_
- Personal property (car tags, boat, trailer) \_\_\_\_\_
- State taxes (from W-2) \_\_\_\_\_

**HOME MORTGAGE INTEREST PAID** Form 1098

- Interest paid on mortgage(s) \_\_\_\_\_
- Home Equity Loan interest \_\_\_\_\_
- Mortgage Insurance Premiums \_\_\_\_\_
- If paid to an individual, need name, address, & their social security number.

**CHARITABLE CONTRIBUTIONS**

- Church, United Way, cash, payroll deducted contributions \_\_\_\_\_  
New I.R.S. ruling states all cash donations regardless of the amount must have receipts.
- Fair market value of clothing, furniture, Etc. contributed. If over \$500, provide details.  
\_\_\_\_\_
- Charitable Miles: **Rate: 14 cents/mile**
- **Must have receipts.**

**EDUCATORS**

Deduction of educator expenses may deduct up to \$250 of out-of-pocket expenses for books and classroom supplies.

**MISC OUT-OF-POCKET BUSINESS EXPENSES: DEDUCTION NO LONGER AVAILABLE!!!**

**CONSTRUCTION WORKERS/TAXPAYERS WHO WORK OUT OF TOWN: DEDUCTION NO LONGER AVAILABLE!!!**

**IF YOU OWN AND OPERATE A BUSINESS**

Last year’s tax return, Schedule C, list expense categories.

- Income \_\_\_\_\_
- New equipment? \_\_\_\_\_  
Include date of purchase and amount paid for depreciation.  
Note: Bring an income and expense statement from your accounting software.

**BUSINESS MILEAGE** Do not complete if auto is used only for commuting to and from work and for personal travel.

**Rate: 54.5 cents/mile**

Miles driven, personal & business

January 1 to December 31 \_\_\_\_\_

Parking fees \_\_\_\_\_

Business miles driven (to meetings; between 1<sup>st</sup> & 2<sup>nd</sup> job; from job to school; job seeking). Must provide log:  
\_\_\_\_\_

**OFFICE IN HOME EXPENSES**

To qualify, an "office in the home" must be used exclusively and on a regular basis (a) as your principle place of business, or (b) by patients, clients, or customers in meeting or dealing with you in the normal course of business.

- Total square feet: Of Home \_\_\_\_\_  
Of Office / Storage \_\_\_\_\_
- Rent \_\_\_\_\_
- Utilities \_\_\_\_\_
- Insurance \_\_\_\_\_
- Taxes \_\_\_\_\_
- Other \_\_\_\_\_
- Child care Use: Days per week: \_\_\_\_\_  
Hours Per Day: \_\_\_\_\_

**FARMER** Last year’s tax return, Schedule F, lists expense categories.

- Income \_\_\_\_\_
- Expenses (subtotal for feed, fertilizer, seed, and all related farming expenses list separately)
- Equipment / livestock -- need date of purchase and amount paid for depreciation.
- No hobby farming

**RENTAL PROPERTY**

Last year’s tax return, Schedule E, lists expense categories.

- Income \_\_\_\_\_
- Expenses (advertising, insurance, interest on loan, repairs, taxes, etc). Need separate entry for each expense.

**SECURITIES / STOCK SOLD (1099-B):**

- Description / # Shares: \_\_\_\_\_
- Selling price \_\_\_\_\_
- Original Cost basis \_\_\_\_\_

Investment company will provide statement.

**Must provide basis.**

**DAYCARE COSTS** (Not covered/reimbursed by FSA). Care for adults or children. Include daycare employer ID number and address: \_\_\_\_\_

If an individual, must have social security number and address: \_\_\_\_\_

**COLLEGE TUITION & FEES** Amount paid, and paid to whom. “Computers, Software, Internet fees, books”. American Opportunity Credit & Lifetime Learning Credit. **Bring 1098-T with School Name, EIN, & Address.**

**STUDENT LOAN INTEREST** \_\_\_\_\_  
**ADOPTION EXPENSES** \_\_\_\_\_

**MEDICAL INSURANCE REQUIREMENT: PROVIDE PROOF OF MEDICAL INSURANCE: FORM 1095-B FROM EMPLOYER OR 1095-A FROM HEALTH INSURANCE MARKETPLACE.**

**RESIDENTIAL ENERGY IMPROVEMENTS TO YOUR HOME IN 2018** (including only geothermal heat pumps, solar energy systems, and small wind turbines).

**Signature:** \_\_\_\_\_

