



Dear client:

It's tax time again! There have been some changes in the tax laws that could have an effect on your income tax return. But don't worry though, because most of these changes are to your benefit:

LOW ON CASH? APPLY FOR A \$750 EASY ADVANCE* LOAN AT THE TIME OF FILING.

DON'T WAIT FOR YOUR W2 TO COME IN THE MAIL, WE CAN **DOWNLOAD YOUR W2 AND FILE YOUR TAXES****

INCREASE IN EARNED INCOME CREDIT TO \$6,242 WHEN CLAIMING 3 OR MORE DEPENDENTS.

MICHIGAN EARNED INCOME TAX CREDIT AVAILABLE.

AMERICAN OPPORTUNITY EDUCATION CREDIT, UP TO \$2,500 AND UP TO \$1,000 REFUNDABLE. EDUCATION EXPENSES INCLUDE BOOKS. Please bring in your 1098-T AND Account Transaction History.

\$1,000 CHILD TAX CREDIT FOR EACH DEPENDENT CHILD UNDER THE AGE OF 17 YEARS .

IF YOU RECEIVE A 1095A OR 1095C, PLEASE BRING IT IN WHEN YOU FILE YOUR INCOME TAXES.

IF YOU ARE A HOMEOWNER, PLEASE BRING YOUR 2015 PROPERTY TAX STATEMENTS (ISSUED BY THE CITY OR TOWNSHIP) WHEN YOU COME TO FILE YOUR TAXES.

DUE TO MORE STRINGENT DOCUMENTATION REQUIREMENTS BY THE IRS, PLEASE SEE PAGE 2 OF THIS DOCUMENT ON WHAT INFORMATION MAY BE REQUIRED OF YOU IN ORDER TO VERIFY ELIGIBILITY OF CREDITS AND FILING STATUS

IF YOU HAVE BEEN A VICTIM OF IDENTITY THEFT AND HAVE BEEN ISSUED A PIN NUMBER FROM THE IRS, PLEASE BRING THIS INFORMATION IN SO WE CAN ELECTRONICALLY FILE YOUR RETURN. PLEASE CONTACT OUR OFFICE WITH ANY QUESTIONS.

BUSINESS OWNERS AND LANDLORDS, PLEASE SEE PAGE 2 FOR INFORMATION YOU NEED TO BRING IN WHEN FILING YOUR TAX RETURN.

IF YOU WOULD LIKE TO HAVE YOUR **REFUNDS DEPOSITED INTO YOUR CHECKING OR SAVINGS ACCOUNT PLEASE **BRING IN** YOUR **ROUTING AND BANK ACCOUNT NUMBERS****

VISIT WWW.SWANINCOMETAX.COM TO DOWNLOAD AND COMPLETE A TAX ORGANIZER BEFORE YOU COME IN

Visit us on Facebook www.facebook.com/swanincometax and online at www.swanincometax.com for additional information, tax worksheets, and promotions

RECEIVE \$10 FOR EACH CLIENT REFERRAL*WE ACCEPT ALL MAJOR CREDIT CARDS

HOURS:
MONDAY-SATURDAY 9a.m - 6p.m.
SUNDAY 8 a.m. - Noon.
(appointments available upon request)

*An Easy Advance (EA) is a \$750 loan secured by your tax refund and is offered by Republic Bank & Trust Company, member FDIC to qualifying applicants. There are no fees or interest associated with the EA. EA proceeds are typically available within 24 hours or less of IRS acceptance of tax return. It may take additional time for your financial institution to post the funds to your account. Visit your tax preparer to learn about the cost and timing of all filing and product options.

**W-2 DOWNLOADS ARE AVAILABLE TO PARTICIPATING EMPLOYERS. PLEASE CALL AHEAD TO SEE IF YOUR EMPLOYER QUALIFIES.

Income Tax Documentation Checklist

Filing Status and Dependent Info

- Lease Agreement/Rent Receipts
- Utility Bills
- Social Security Cards
- Birth Certificates
- Valid Driver's License or State ID

Income Forms

- W2s
- Dividend Statements
- Bank Interest Statements
- 1099R - Retirement/Pension
- Unemployment Statements (1099-G)
- Social Security Statement
- Stock Sales
- K-1's
- W2G (Gambling Winnings)
- 1099A and 1099C (Cancellation of Debt)
- Alimony Paid/Received

Deductions

- Mortgage Interest Statements
- Property Tax Statements
- Child Care Expenses (Tax ID or SSN required)
- Education Expenses (Form 1098-T, Account Transaction History from the school, & amounts paid for books, & supplies)
- Cash Donations
- Non-Cash Donations
- IRA/Roth IRA contributions
- Health Savings Account Contributions
- Educator Expenses
- Moving Expenses (job related)
- Medical Expenses
- Mileage (log book required for your records)
- Closing Statement (new purchase or sale)
- Job Seeking Expenses
- Student Loan Interest

Health Insurance Information

- Proof of Insurance Coverage for everyone on tax return
- 1095-A Health Insurance Marketplace Statement
- 1095-B Health Coverage

- 1095-C Employer Provided Health Insurance Offer & Coverage

Self-Employment (see Repair Regulations)

- 1099MISC and/or Record of Income Received
- Mileage (log book required for your records)
- Supplies
- Materials
- Insurance
- Wages/Commissions
- Travel/Entertainment/Meals
- New/Used Equipment Purchases
- Advertising Expenses
- Auto/Equipment Repairs
- Fuel Expenses
- License Fees
- Repairs/Maintenance
- Utilities
- Contract Labor
- Rents
- Interest
- Office Expenses
- Equipment Purchased
- Bank statements

Rental Property (see Repair Regulations)

- Rental Income Received
- Mortgage Interest Statements
- Property Tax Statements
- Insurance
- Repairs
- Supplies
- Utilities
- Advertising
- Legal Fees
- Maintenance/Cleaning
- Inspection
- Closing Statement (new purchase or sale)
- Improvements
- Inspection Fees
- Management Fees
- Landscaping
- Bank Statements

- Credit Card Statements
- Mileage (log book required for your records)

Note:

- For stock sales bring purchase and sales price if not included on statement provided by brokerage
- For Child Care Credit, bring Tax ID or Social Security number, name and address of provider
- For Cash Donations a written statement/cancelled check are required for your records
- All Expenses and Income must be substantiated with necessary documentation if audited