

OUR PROMISE TO You

We will deliver knowledgeable, prompt, and reliable tax services. We understand that responsiveness and personal attention to every client are critical to our shared success. We will continually strive to provide exceptional service.

CALL TODAY TO
SCHEDULE YOUR
APPOINTMENT!

405.354.1402



PLACE
STAMP
HERE

Joseph P. Norman CPA, PC

800 Garth Brooks Blvd., Ste 120
Yukon, OK 73099

WHAT DO YOU NEED TO FILE MY TAXES?

Before your appointment, go through the enclosed checklist. Highlight the areas that apply to you, and make sure you have that information available.





PERSONAL INFORMATION

- ◇ Social Security numbers and dates of birth for you, your spouse, your dependents
- ◇ Childcare records (including the provider's tax ID number) if applicable
- ◇ Your Address and Contact Phone Numbers
- ◇ Copies of last year's tax return for you and your spouse (helpful, but not required)
- ◇ Bank account number and routing number, if depositing your refund directly into your account

INCOME INFORMATION

- ◇ Forms W-2
- ◇ Forms 1099-MISC, Schedules K-1
- ◇ Rental Property Income Records of income and expenses.
- ◇ Pension/IRA/annuity income (1099-R)
- ◇ Social Security Income (1099-SSA)
- ◇ 1099-Misc for Oil & Gas Royalties or Working Interest

INCOME CONT.,

- ◇ Income from sales of stock or other property (1099-B, 1099-S)
- ◇ Income from sales of stock or other property (1099-B, 1099-S)
- ◇ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ◇ Unemployment, state tax refund (1099-G)
- ◇ Gambling income (W-2G, expense records)
- ◇ Amount of any alimony received
- ◇ Health Savings Account (1099-SA)
- ◇ Other 1099

DEDUCTIONS AND CREDITS

- ◇ Receipts for classroom expenses (for educators in grades K-12)
- ◇ Form 5498-SA showing HSA contributions
- ◇ Record of moving expenses not reimbursed by employer
- ◇ Forms 1098 or other mortgage interest statements



DEDUCTIONS AND CREDITS CONT.,

- ◇ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ◇ Real estate and personal property tax records
- ◇ Invoice showing amount of vehicle sales tax paid
- ◇ Cash amounts donated to houses of worship, schools, other charitable organizations
- ◇ Records of non-cash charitable donations
- ◇ Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- ◇ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- ◇ Record of estimated tax payments made

AFFORDABLE CARE ACT

- ◇ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- ◇ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, Medicare, Medicaid, etc.)

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