TAX 29

Dear TAX 29 client,

Happy New Year to all of you! We were blessed to have another great tax season with over 5,000 returns prepared at our Warren office alone, and over $10,000,000 in refunds for our customers. The Big Beautiful Bill is now law and there are major tax changes that will impact almost all of our customers. Most taxpayers will see an increased standard deduction, and most seniors will see and extra $6,000 deduction. Also included are deductions for certain levels of overtime and tips along with expanded limits for state and local tax deductions.

Tax 29 remains committed to helping customers obtain all legal credits and deductions, while trying to make the tax filing experience easy. We continue to offer our clients several ways to file with us:

- **In person service - walk in or appointment**
- **Drop off your return - any time during office hours**
- **Mail, fax, or email your return to us. Please attach the Client Data Sheet from our resource page at tax29.com**

Our tax season office hours are Monday to Friday 9-8 and Saturday 9-5. We also offer year round service with off-season hours Tuesday and Thursday 9-5. Clients who have businesses, rental property, or had other tax changes may want to request a complete organizer or use our fill-able worksheets available at tax29.com. Also, let us know if you have had any changes to your filing status or dependent status.

Our year round services include:

- **Medicare consultations**
- **Tax preparation**
- **Tax planning & consultations**

We look forward to helping you through your specific tax situation this year and beyond.

Sincerely,

Melissa M. Zetts E.A. & staff

2170 Millennium Blvd.
Ste C
(234) 806-5252
warren@tax29.com

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Income List

Income	Name of Employer	Wages
W-2 Income:	____________________	__________
	____________________	__________
	____________________	__________
	Name of Bank	**Interest Income**
Interest Income:	____________________	__________
	____________________	__________
	Name of Institution	**Dividend Income**
Dividend Income:	____________________	__________
	____________________	__________
	Name of Payer	**Income Received**
Other Income: (Unemployment, royalties, Social Security, etc.)	____________________	__________
	____________________	__________
Tip Income Deduction	____________________	
Overtime Deduction	____________________	

Please contact us with any questions regarding other income that you might have, including capital gains, sale of residence, sale of a business, gas well leases, and natural gas royalties, or other forms of income not covered on this sheet.

Did you have any changes in dependents this year? Y / N

Name: ______________________________

S.S.# __________________________

Date of Birth: ______________ **Relationship:** ____________

Months lived in your home in 2025: ________

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Basic Deductions and Credits

Medical Expenses

Prescriptions: ____________

Doctors, Dentists, Nurses: ____________

Hospitals, Nursing Homes: ___________

Insurance Premiums: ____________

Medical Lodging & Transportation: ____________

Other Medical Costs: ____________

Charitable Contributions

Cash Contributions: ____________

Noncash Contributions: ____________
(Goodwill, Salvation Army, etc.)

Volunteer Expenses: ____________
(Out of pocket or mileage)

Dependent Care Credit

Name and address of care provider: ____________________

____

SS# or EIN# ____

Phone #: ___________________ Amount paid: __________

Higher Education Credits

Tuition and fees: ___________

Student's year in School ___________

Student full time: Y / N

Home Owner Deductions & Credits

Mortgage Interest: ____________

Property Tax: ____________

Points paid on purchase: ____________

Energy related improvements ____________
(Hot Water Tank, Furnace, Windows, Insulation, etc.)

Car license fees: ____________
(Not applicable in OH)

Investment interest: ____________

Miscellaneous Deductions

New Care Interest paid ____________
(New Qualifying Cars Only)

Gambling Loss: ___________
(To the extent of winnings)

Taxes paid ___________
(Sales tax on large purchases)
(Personal Property Taxes)

IRA contributions made ___________

Alimony paid ___________
(pre-2019 agreement)

Marketplace Health Insurance ___________

529 Plan contributions ___________

Home Schooling Expenses___________

Student loan interest ___________

Please ask us for additional deduction sheets for rental property and for small businesses.

Direct Deposit Information

Bank: ____________________________ **Routing Number (9 digits):** ______________________

Account Number: ____

List any tax questions that you have for your preparer.

Basic checklist for tax interview (does not cover all deductions and income types)

INCOME:

W-2's (Include any tips or overtime)
1099-R, 1099-INT, 1099-DIV, etc.
1099s from investments
Social Security
Unemployment, state or local tax refund (1099-G)
Gambling income (as well as expense records)
Amount of any alimony received and ex-spouse's name
Health care reimbursements (1099-SA or 1099-LTC)
Prizes and awards
Sales of stock, property, or other assets (include loss carryovers)
Other 1099s, 1099-NEC, 1099-MISC
Any other income
Self employed income and expenses including rental income and expenses

EXPENSES:

Forms 1098 or other mortgage statements
Real estate and personal property tax records
HUD statement showing closing date of home purchase
Receipts for charity
Receipts of non-cash charitable donations
Healthcare costs
Health Insurance information
Form 1095-A for Marketplace Health Insurance
Amounts of miles driven for charitable or medical purpose
Receipts for home energy efficiencies
Education expenses (1098-T)
Daycare expenses w/caregiver info
Record of alimony paid (pre-2019 agreements)
Record of estimated tax paid Federal, State, and City
Any other documentation related to deductions or credits
Vehicle related expenses for business
Repayment of 2008 first time homebuyer credit
Business expenses
Rental Property expenses

Please contact the office with any questions:

TAX 29 Warren/Cortland Office:

2170 Millennium Blvd., Ste C
Cortland, OH 44410

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Fax: (234) 806-5251
Email: warren@tax29.com