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Remember Benjamin Franklin said that "If you fail to plan, you are planning to fail."

In this case, your failure may be the crippling prospect of owing thousands of dollars in taxes. Let the experts at Gordon & Associates CPA help you plan for your taxes to secure your future.

### INFORMATION YOU WILL NEED...

#### Information about your income:

- Last paystub – preferably at the end of the most recent month
- Year to date income as an independent contractor
- Year-to-date Profit & Loss for all entities owned partially or completely.
- Year-to-date Balance Sheet for all entities owned partially or completely.
- Year-to-date Social Security income
- Year-to-date Investment income or retirement distribution
- Year-to-date unemployment income, state, or local tax refunds
- Year-to-date Miscellaneous income (jury duty, gambling winnings, medical savings account, scholarships)
- 1099-S – Income from sale of a property
- Year-to-date Alimony
- Year-to-date interest, dividends, capital gains distribution from brokerage accounts

#### Adjustments to your income:

- Year-to-date IRA contributions
- Year-to-date tuition payments
- Year-to-date Medical Savings Account (MSA) contributions
- Year-to-date mortgage interest
- Casualty and theft losses; amounts of damages; insurance reimbursements
- Year-to-date home office expenses (electricity, internet, water)
- Medical and dental expense
- Year-to-date Childcare costs