



REMINDERS FOR YOUR 2016 TAX PREPARATION

- 1. HEALTH INSURANCE** – There is still a requirement to report health insurance coverage. **PLEASE INCLUDE ALL FORMS/STATEMENTS RECEIVED FROM YOUR HEALTH INSURANCE CARRIER, THE MARKETPLACE AND/OR EMPLOYER.** If we need to call you for this information it **WILL DELAY** your return. Additional fees may apply for this reporting requirement.
- 2. DONATIONS** – Charitable donations are being heavily scrutinized by IRS. A donation through an online campaign such as GoFundMe is usually NOT a charitable donation and therefore not deductible. Remember to place a value on all goodwill and salvation army donation receipts. Also, please include receipts for your cash donations. Cancelled checks for contributions less than \$250 or written acknowledgment from the organization are acceptable. For contributions over \$250 you must have written acknowledgment from the organization.
- 3. FILING DEADLINES** – This year individual returns are due Tuesday April 18th, S-Corporation returns and Partnership returns are due Wednesday March 15th, and C-Corporation returns are due Tuesday April 18th. **Some individual refunds will be deadline this year.**
- 4. EDUCATION CREDITS** – If you or your dependent attended college in 2016 we must have the Form 1098-T showing the institution's Federal Id number and the amounts paid/billed in order to claim the education credits. The credit is based on amounts paid not billed so an account transcript reflecting all payments will also be required.
- 5. IDENTITY THEFT** – If IRS has assigned you an Identity Protection Personal Identification Number (IP PIN), we must receive a copy of that letter in order to electronically file your return.