TAX 29

Dear TAX 29 client,

Happy New Year to all of you! We were blessed to have another great tax season with over 13,000 returns prepared at our Boardman office alone, with almost $30,000,000 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 an extra $6000 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 Client Data Sheet from our resource page at tax29.com**
- **File online through our secure website at tax29.com and follow the easy steps**

Our tax season office hours are Monday to Friday 9-8 and Saturday 9-5. We also offer year round service with offseason hours Monday, Tuesday, and Friday 10-5. Clients who have businesses, rental property, or had other tax changes may want to request a complete organizer or use our fillable worksheets available at tax29.com. Also let us know if you've had any changes to your filing status or dependent status.

Our year round services include:

- **Medicare consultations**
- **ACA Health plans**
- **Tax planning and consultations**

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

Sincerely,

Your Tax 29 team



7027 Tiffany South
(330) 758-0233
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TAX 29

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

Student loan interest: _____

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 Car 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 _____

Homeschooling Expenses: _____

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
IRS letter 6419 for advanced child tax credit

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 Boardman Office:

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(330) 758-0233 tax29.com
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Email: boardman@tax29.com