

## HEALTH INSURANCE INSTRUCTIONS

This year, all taxpayers are required to report whether or not all members of their household have health insurance. For any member of your household that does not have health insurance that you claim as a dependent, a penalty may be assessed on your 2015 Form 1040. If a member of your household has health insurance through an employer, Medicare, Medicaid, CHIP, or an individual health insurance policy you will be asked to provide me with this information during your appointment. This year many of you will receive a 1095-B or C from your employer, please bring this from to your tax appointment.

If you are claiming a child on your tax return that you do not pay for their health insurance, please confirm that the person responsible for providing health insurance for them did so for the entire year. If they did not provide health insurance for the entire year, and you are claiming the child on your Form 1040, you will be responsible for any penalty assessed.

**If you purchased health insurance through the federal exchange please read the following carefully.** The Health Insurance Exchange will be mailing you a Form 1095-A no later than January 31, 2016. If you are claiming a child on your tax return that someone else purchased health insurance for through the Health Insurance Exchange, you will need the person who purchased the health insurance for your child to provide you with a Form 1095-A showing that the child has health insurance coverage. I will be unable to file your return without a Form 1095-A for all individuals that you have claimed on your return, who are covered through a Health Insurance Exchange policy. If you lose the Form 1095-A that you are sent, the exchange has said it may take as long as eight weeks to issue a new one. If you know your log in and password we can print a copy of the 1095-A at your appointment.

**Do not let your dependents file their own tax returns this year. Please allow my office to prepare it for you; or review it for you, prior to your submitting it.** If your dependents' return is filed incorrectly, you may lose thousands of dollars in Health Insurance Exchange subsidies.

## ORGANIZER INSTRUCTIONS

Please take a few minutes to complete this tax organizer. It is especially helpful to me if you will update your contact information such as emails and telephone numbers so that I am able to contact you throughout the year should the need arise.

## 2015 INCOME TAX ORGANIZER

Brian K Shoell, P.C.  
Certified Public Accountant

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### TAXPAYER INFORMATION

TAXPAYER	SPOUSE
Name:	Name:
Social Security #:	Social Security #:
Date of Birth:	Date of Birth:
Mailing Address:	Mailing Address
Health Insurance Y or N	Health Insurance Y or N
Health Insurance Exchange Y or N	Health Insurance Exchange Y or N
Form 1095 A, B or C Y or N	Form 1095 A, B or C Y or N
Phone	Phone
Home:	Home:
Work:	Work:
Cell:	Cell:
E-mail:	E-mail:

### DEPENDENT INFORMATION

Name	SSN	Birthday	Relationship	W2 or 1099	Health Insurance
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N

### ESTIMATED INCOME TAX PAYMENT INFORMATION

FEDERAL			STATE	
DUE DATE	DATE PAID	AMOUNT	DATE PAID	AMOUNT
4/15/2015				
6/15/2015				
9/15/2015				
1/15/2016				

### ELECTIONS

Apply refund to next year's estimated tax payments?	Yes No
Do you wish to electronically file your tax return?	Yes No
Would you like any refunds directly deposited?	Yes No

### WAGES and RETIREMENT PLAN DISTRIBUTIONS

**\*Include W2 and 1099R Form(s)**

Name of Payer	Gross Amount	Federal Withholding	State Withholding

<b>INTEREST INCOME</b>	
<b>*Include 1099-INT Form(s)</b>	
Bank/Institution	Amount

<b>DIVIDEND INCOME</b>	
<b>*Include 1099-DIV Form(s)</b>	
Source	Amount

<b>OTHER INCOME</b>			
Please provide supporting forms and documents from any of the following sources of income:			
Type	Provide	Type	Provide
Stock Sales	1099-B	Rental Income	1099-MISC & Accounting
Debt Forgiveness	1099-C	Royalty Income	1099-MISC
Retirement Income	1099-R	Prizes & Awards	1099-MISC
Commissions	1099-MISC	Gambling Winnings	W-2G
Unemployment	1099-G	Land/Home Sales	Settlement Statement
State Tax Refunds	1099-G	Self Employment	Income & Expense
Social Security Income	1099-SSA	Alimony	Summary of Revd.
Partnership/S-Corp	K1	Farm Government	1099-G
Trust/Estate	K1	Health Insurance	Form 1095 A,B, or C

**2015 DEDUCTIONS/CREDITS AND LIMITATIONS**

**Health Savings Accounts (HSA) Deduction**

For 2015 the following limitations apply: Family \$6,650, Self Only \$3,350. Age 55 an additional \$1,000 catch-up contribution per qualifying spouse. Contributions are due by 4/15/2016

**Individual Retirement Account (IRA) Deduction**

For 2015 the following limitations apply: Under the age of 50 - \$5,500, Age 50 and over-\$6,500. Contributions are due by 4/15/2016.

**Child Tax Credit**

Provides a \$1,000 credit for each child claimed that is under the age of seventeen.

**Child Care Credits**

To claim this credit you will need the care providers name, address, and social security number/ employer identification number. The credit is limited to 35 percent of qualifying expenses, \$3,000 for one child, \$6,000 for two or more children.

## ITEMIZED DEDUCTIONS

### MEDICAL

Insurance

Health, Accident, Dental \_\_\_\_\_

Long-Term Care \_\_\_\_\_

Medicare \_\_\_\_\_

Out-of-Pocket

Prescription medicines & drugs \_\_\_\_\_

Doctors, dentists, and nurses \_\_\_\_\_

Hospitals and nursing homes \_\_\_\_\_

Medical Lodging & Transportation

Out-of-pocket expenses \_\_\_\_\_

Medical miles driven \_\_\_\_\_

### CHARITABLE CONTRIBUTIONS

Cash Contributions

Churches \_\_\_\_\_

Schools \_\_\_\_\_

Other Organizations \_\_\_\_\_

Volunteer Expenses

Out-of-pocket expenses \_\_\_\_\_

Charitable miles driven \_\_\_\_\_

Non-Cash Contributions

Under \$500 \_\_\_\_\_

Over \$500 \_\_\_\_\_

### INTEREST

Real Estate

Mortgage (Banks) \_\_\_\_\_

Mortgage (Others) \_\_\_\_\_

Name \_\_\_\_\_

EIN \_\_\_\_\_

Points, Origination \_\_\_\_\_

Mortgage Insurance \_\_\_\_\_

Other

Investment Interest \_\_\_\_\_

### TAXES

Real Estate

Residence \_\_\_\_\_

Investment Property \_\_\_\_\_

Property Tax (Utah)

Heavy Trucks \_\_\_\_\_

Commercial Trailers \_\_\_\_\_

Motor Home \_\_\_\_\_

### MISCELLANEOUS DEDUCTIONS

**For additional deduction please visit [401kcpa.net/employment-deductions](http://401kcpa.net/employment-deductions)**

<p>Casualty &amp; Theft Losses _____</p> <p>Unreimbursed Employee Expenses _____</p> <p style="padding-left: 20px;">Travel _____</p> <p style="padding-left: 20px;">Meals &amp; Entertainment _____</p> <p style="padding-left: 20px;">Uniforms, Tools, Equipment _____</p> <p>Work-Related Education _____</p> <p>Job Search Expenses _____</p> <p>Union &amp; Professional Dues _____</p>	<p>Hobby Expenses _____</p> <p>Legal Expenses _____</p> <p>Safe Deposit Box _____</p> <p>Gambling Losses _____</p> <p>Occupational Taxes _____</p> <p>Work Regulatory Fees _____</p> <p>Home Office _____</p>
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