FOX TAX PLANNING AND PREPARATION
1400 12TH AVE NE
MINNEAPOLIS, MN 55413
INFO@FOXTAXSERVICE.COM
PHONE 612.824.2829
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WHAT TO BRING TO YOUR APPOINTMENT

Or Upload to Portal HERE

INCOME

YES	N/A	
☐	☐	W-2s
☐	☐	1099-R (Distributions from IRAs/401ks/other retirement accounts)
☐	☐	1099-INT (Interest Income)
☐	☐	1099-DIV (Dividend and Capital Gain Income)
☐	☐	1099-B (Sale of Stocks/Mutual Funds) - Check to see if all sales have corresponding cost info
☐	☐	1099-MISC (Self Employment Income) - **FILL OUT BUSINESS INCOME/EXPENSE WORKSHEET**
☐	☐	1099-K (If you accept credit cards or Paypal from customers your credit card company will issue this)
☐	☐	1099-G (Unemployment Received)
☐	☐	1099-A/1099-C (Cancellation of Debt or Property Foreclosures)
☐	☐	K1 (Income from Partnership, Estate, Trust or S Corporation)
☐	☐	SSA-1099 (Social Security Income)
☐	☐	Alimony/Spousal Maintenance Received **AMOUNT** $ ______
☐	☐	Rental Income - **FILL OUT RENTAL WORKSHEETS**
☐	☐	Did you own or have signature authority over any foreign financial assets (bank, brokerage, etc...) during the tax year? *If yes, bring info on foreign investment income and max. account values during tax year*
☐	☐	Do you have any other sources of income (bartering, hobbies, sales of property etc...)? If so, please bring information

DEDUCTIONS/CREDITS

YES	N/A	
☐	☐	1098-T (Tuition Statement for College Education) - **Please ALSO bring transcript showing actual tuition payments.**
☐	☐	1098-E (Student Loan Interest Paid) - **NEW MN CREDIT!** See page 4 for details of what to bring.
☐	☐	1098 (Mortgage Interest Paid)
☐	☐	Did you buy, sell or refinance any property this year? **Bring all Settlement Statements / Closing Disclosure**
☐	☐	Charitable Donations - Bring receipts plus itemized list of non-cash items/values. See www.itsdeductible.com for valuation
☐	☐	Proof that children live with you - Bring school, health records or other documents. This is for **ALL** dependents this year.
☐	☐	Quarterly Estimated Tax Payments - **Bring list of date and amount of each payment made**
☐	☐	1095-A, 1095-B and/or 1095-C (Proof of Health Insurance from government, insurance company, or employer, respectively)
☐	☐	Did your dependent have investment income? - Bring tax forms
☐	☐	All Adoption Papers and proof of expenses for Adoption Credit
☐	☐	MN Long Term Care Insurance & 529 plans - bring account numbers and amounts paid.
☐	☐	MN K-12 Education Expenses - Click Here for eligible costs and bring itemized list

OTHER IMPORTANT ITEMS

YES	N/A	
☐	☐	**Signed Release of Exemption Form 8332** if you are claiming a child that does not live with you
☐	☐	Signed 2017 Tax Preparation Agreement **FILL OUT WORKSHEETS**
☐	☐	Tax CD from last year if we didn't use email or portal
☐	☐	**For NEW clients:** Copy of last year's taxes
☐	☐	**For Corporations:** Year End Balances on all accounts and loans - If you have Quickbooks or other accounting software, email bookkeeping to your accountant before scheduling an appointment
☐	☐	Would you like to make a donation to the Nongame Wildlife Fund? **AMOUNT** $ ______

______ Prep. Initials

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2017 TAX PREPARATION AGREEMENT

Date			
Taxpayer Name		Spouse's Name	
Address	City	State	Zip

PREPARATION OF YOUR 2017 TAX RETURNS

Thank you for choosing **Fox Tax, LLC** to assist you with your 2017 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements by signing below.

We will prepare your 2017 federal and requested state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover. The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the forms required plus out-of-pocket expenses. Invoices are due and payable upon presentation. We will require payment prior to electronic filing of your tax return.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your 2017 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). Review all tax-return documents carefully before signing them.

In an effort to save trees, we will provide your copy of the tax return electronically unless a paper copy is specifically requested.

If you and/or your business entity have a financial interest in any foreign accounts or assets, you may be responsible to file Form FinCen 114 (formerly known as "FBAR") with the Department of Treasury by April 15th. This engagement for income tax does not cover this additional separate filing requirement. If you have any foreign assets and want help with such filings, a separate engagement needs to be explicitly requested and agreed to in writing. If you do not inform your preparer of any foreign assets, we will presume you do not have any and will hold no responsibility for failure to file required disclosures.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us with your tax info.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

Mark Fox
Alyssa Fox

FOX TAX, LLC

ACCEPTED BY *(Both spouses must sign for preparation of joint returns)*

Taxpayer Signature	Date
Spouse Signature	Date

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TAX PREPARATION WORKSHEET

PERSONAL DATA

Taxpayer Name	Spouse's Name
SSN	SSN
DOB	DOB
Phone	Phone
Email	Email
Occupation	Occupation

Address	City	State	Zip

DEPENDENT ONE*	DEPENDENT TWO*	DEPENDENT THREE*
Name	Name	Name
SSN	SSN	SSN
DOB	DOB	DOB
Relationship	Relationship	Relationship
K-12 Education Expense	K-12 Education Expense	K-12 Education Expense
Daycare Expense	Daycare Expense	Daycare Expense
Daycare Name	Daycare Name	Daycare Name
Daycare SSN/Fed ID#	Daycare SSN/Fed ID#	Daycare SSN/Fed ID#
Daycare Address	Daycare Address	Daycare Address

DEDUCTIONS

Student Loan Interest****	IRA Contributions ☐ IRA ☐ ROTH ☐ SEP	Moving Expenses**
College Tuition/Fees *(bring tuition statement)*	Investment Exp	Employee Expenses (*use business expense worksheet*)
Mortgage Interest Paid	Property Tax	Mortgage Insurance (PMI)
Medical Expenses	Health Insurance	Car Tabs
Charity by Cash/Check	Non-Cash Charity***	Tax Prep Fees
Alimony Paid	HSA Contributions	Union Dues
529 Contributions	Long Term Care Ins. Prem.	Educator Expenses

** Bring proof that dependent(s) live with you - school, health records or other documents. If they do not live with you, bring signed Form 8332.*

*** For move of 50 miles or more due to job, please bring detailed list of Moving Costs and Employer Reimbursement (if any).*

**** Bring itemized donation receipts if non-cash donations exceed $500. For help valuing your non-cash donations, look at www.itsdeductible.com*

***** See Page 4 for detailed information needed to claim* ***NEW MN CREDIT***

ADDITIONAL NOTES OR QUESTIONS

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2017 HEALTHCARE VERIFICATION

*SELECT **ONE** OF THE CATEGORIES BELOW*

- *Bring Form **1095-A** if you had coverage from Exchange (Bronze, Silver, Gold type plans), NOT if you had MNCare or Medical Assistance.*
- *Bring **1095-B** and/or **1095-C** if you received from insurance company, employer or MNCare/Medical Assistance provider.*

MARK ONE

A — **EVERYONE IN MY HOUSEHOLD WAS COVERED BY INSURANCE ALL YEAR**

Insurance Company Name:	Policy #
Insurance Company Name:	Policy #

B — **I WAS COVERED FOR ONLY PART OF THE YEAR**

Insurance Company Name:	Policy #
Insurance Company Name:	Policy #

ENTER THE NUMBER OF HOUSEHOLD MEMBERS INSURED EACH MONTH

JAN	MAY	SEP
FEB	JUN	OCT
MAR	JUL	NOV
APR	AUG	DEC

C — **I DID NOT HAVE HEALTH INSURANCE ALL YEAR**

SIGNATURE

	Date
Name	

MN RESIDENTS ONLY

STUDENT LOAN INTEREST CREDIT

	LOAN 1	LOAN 2	LOAN 3
Total Loan Payments during Year			
Total Interest Paid (See 1098E)			
Original Loan Balance *(Contact your loan provider for this information before your appt!))*			

LONG TERM CARE

Insurance Co. Name	Policy #	Ins Prems Paid

529 CONTRIBUTIONS

Account #	Total Contributions

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RENTAL PROPERTY WORKSHEET

RENTAL PROPERTY ADDRESS *(Fill out one sheet for each rental property — Do not combine)*

Address	City	State	Zip
Date Rental Started *(If new)*	Property Type ☐ Single Fam ☐ Duplex ☐ Apt Bldg ☐ Land ☐ Commercial ☐ Room Rental ☐ Other		

RENTAL INCOME	**AMOUNT**
Total Rents Received *(Do not include refundable deposits)*	

EXPENSES	**AMOUNT**
Advertising & Promotions *(Advertising for rental property)*	
Business Miles Driven *(Miles driven for rental business)*	
Cleaning and Maintenance *(Any cleaning or maintenance costs)*	
Commissions *(Paid to rental agencies, etc.)*	
Insurance *(PMI, liability and/or umbrella policies)*	
Legal and Accounting	
Management Fees *(Paid for management by someone else)*	
Interest - Mortgage *(Bring Form 1098)*	
Interest - Other *(Credit cards/other loans just for rental)*	
Repairs *(Repairs to rental property)*	
Supplies *(General supplies for rental property)*	
Taxes *(Property taxes)*	
Utilities *(Paid by you for rental property)*	
Association Dues	
Rental License Fees	
Bank Charges *(Bounced check fees, etc.)*	
Appliances *(Use Equipment Worksheet to list multiple items)*	
Improvements *(Major improvements - Use Equipment Worksheet to list multiple items)*	
Furnishings *(Use Equipment Worksheet to list multiple items)*	
TOTAL EXPENSES	

NET INCOME	

- *Bring Settlement Statement/Closing Disclosure for any purchase, sale or refinance*
- *Fill out one of these pages for* ***EACH RENTAL PROPERTY***
- *If converting property to rental, we need Fair Market Value of property at time of conversion as well as your cost of buying and improving property*

AIRBNB, VRBO & SHORT TERM RENTAL

How many days was property rented during the year?	
Sales Tax Collected/Paid	
Fees Paid to Online Services	
Was average stay of guests 7 days or less?	☐ Yes ☐ No

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BUSINESS INCOME / EXPENSE WORKSHEET

BUSINESS INFORMATION ***(FILL OUT ONE SHEET FOR EACH BUSINESS** *— Do not combine*)			
Business Name / Profession			
INCOME		**1099-MISC / SELF EMPLOYMENT**	**ATTRIBUTED TO W2**
Income Received *(List all self-employed income in 1099 / Self Employment column)*			
Sales Tax Collected *(If included in income above - only if you charge sales tax)*			
COST OF GOODS SOLD		**1099-MISC / SELF EMPLOYMENT**	**ATTRIBUTED TO W2**
Total Production Costs *(Direct costs to make products)*			
Ending Inventory *(At your cost, not retail)*			
EXPENSES		**1099-MISC / SELF EMPLOYMENT**	**ATTRIBUTED TO W2**
Advertising: Promo, Website costs, etc. *(Anything for promotion of business)*			
Auto Expenses *(See auto and in home office worksheet below)*		SEE AUTO WORKSHEET	
Commissions and Fees *(Agents, managers, etc.)*			
Subcontractors* *(Total labor - did you pay any one person more than $600? Yes / No)*			
Equipment Purchases *(Items costing more than $500 have a useful life > 1 year)*		SEE EQUIPMENT WORKSHEET	
Business Insurance			
Business Interest *(Loans or 100% business credit cards)*			
Legal and Accounting			
Office and Postage			
Equipment Rental *(Equipment Rental and Car Rental — including gas)*			
Business Rent *(Rent for office or practice space)*			
Equipment Repairs *(Repairs on computers, equipment, etc.)*			
Supplies *(Any small items needed for bus.)*			
Taxes & Licenses *(Business licenses and/or Misc. Business taxes-MNCare, etc.)*			
Travel *(Airfare, lodging--not food or auto)*			
Meals and Entertainment In Town *(Business meals with others)*			
Days Out of Town *(For out of town meal per diems)*		SEE PER DIEM WORKSHEET	
Wages Paid to Others *(Bring details on payroll and payroll taxes)*			
Bank and Credit Card Charges *(On business accounts)*			
Dues and Subscriptions *(Memberships, magazines, etc.)*			
Research and Development *(Books, classes, activities in your field)*			
Telephone *(Bus. line, 2nd line, and bus. % of cell phone)*	Bus. Use %		
Internet *(List % used for business)*	Bus. Use %		
Computer Software			
Printing and Film Processing *(For business photos)*			
Business Gifts *(Limited to $25 per recipient per year)*			
Costumes and Props *(Performers - things only worn on stage)*			
Personal Maintenance *(Performers - direct costs for performance image)*			
OTHER *(List out any costs that didn't fit in the above categories)*			
Health Insurance Paid			
Quarterly Estimates Paid (Bring dates & amounts paid)		BRING LIST OF DATES AND AMOUNTS PAID	
Retirement Account Contributions *(What kind? Trad IRA, Roth, SEP, 401K?)*			
Local Business Travel			
Other:			

**If you paid $600 or more to subcontractors, you s file a form 1099-Misc for their labor costs by January 31st*
**You can create and file Form 1099-Misc online with 15% discount here*

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AUTO EXPENSE WORKSHEET

FILL OUT FOR MILEAGE OR ACTUAL	VEHICLE ONE	VEHICLE TWO
Year and Make of Vehicle		
Date Purchased/Leased		
Odometer Reading on December 31		
Total Miles Driven in 2017		
Business Miles Driven ***(Only for Car that you Own)***		
Commuting Miles Driven		
Parking and Tolls		
License Plate Taxes Paid		
Interest Expense		
FILL OUT BELOW IF CLAIMING ACTUAL EXPENSES	**VEHICLE ONE**	**VEHICLE TWO**
Purchase Price / Lease Equivalent *(If new purchase)*		
Gas		
Repairs & Maintenance		
Insurance		
Lease Cost		
TOTALS		

IN-HOME OFFICE EXPENSE WORKSHEET

	OFFICE ONE	OFFICE TWO
Square Footage of Office		
Square Footage of Entire House		
Date Placed in Service		
Mortgage Interest Paid		
Property Taxes Paid		
Insurance on Home *(Hazard and Private Mortgage Insurance)*		
Repairs and Maintenance*		
Improvements* *(Use Equipment Worksheet to list Separate Improvement Projects)*		
Utilities		
Rent Paid		
Other		
Association Dues		
Cost of Home *(If new: list purch + prior investments)*		
TOTALS		

**Expenses directly related to office space are 100% deductible - LIST SEPARATELY*

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EQUIPMENT WORKSHEET

ITEM	DATE PURCHASED	COST*	BUSINESS % OF USE	DATE SOLD	SALE PRICE
TOTALS					

If first year of business and you had personal equipment that became business, please list Fair Market Value rather than purchase price

☐ Check Here to Elect to Treat any Single Items Costing Under $2500 as an Expense. If checked, only list items >$2,500 above and include smaller expenses in Supplies.

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PER DIEM WORKSHEET - DAYS OUT OF TOWN FOR BUSINESS

Click Here or see GSA Website for Continental U.S. M & IE Per Diem Rates

Click Here or See U.S. Dept of State for Foreign M & IE Per Diem Rates

DATE	CITY, STATE	COUNTRY	NIGHTS STAYED	RATE*	TOTAL PER DIEM	ACTUAL MEAL COST**
TOTALS						

Use the "M&IE" column on PD websites. Do not use Lodging Per Diems.
***List Actual Meal expenses for trips out of town IF actual costs exceed the Per Diem allowed for that trip*