

GET THE FILE SMILE



Checklist for 2014 Tax Season

Life Changes in 2013

- Status – Newly married, divorced, widowed, etc.?
- Dependents – Any children born or adopted this past year? Into your family, of course.
- Location – Did you move in the past year? Like move to a new state move, not get up out of bed move.
- Housing – Did you buy or sell a home?
- Employment – Did you start a new job? Did you move to get the job?
- Living Arrangements – Did your grown kids or your parents move in with you?
- Pets - Did you get a new puppy or kitten? Congratulations! But this really has nothing to do with taxes. Gotcha!

Affordable Care Act (ACA) Reminders

- Do you have health insurance now?
- Did you get health insurance through your employer?
- Did you get health insurance through an Exchange?

Filing Reminders

- Do you have your tax documents? (*W-2s, 1099s, 1098s, charitable donation statements, receipts*)
- Are you missing any documents needed to file? If unsure, compare to last year's return or tax records.
- Have you created your account on 1040.com?

If you are still waiting on some of your tax documents to arrive, check out our free eBook, **Taxes in Plain English (tax jargon kept to a minimum)**. It's a short read on filing your taxes and it's our most popular book! Okay, so it's our only book. But it's still a good read, check it out! <https://www.1040.com/featured-content>

Not ready to file but ready to find out how big that refund is going to be? Use our free estimator. It's fast and easy - plug in a few numbers and BAM! You're done. You have to try it to see what we mean. <https://www.1040.com/tax-tools/tax-estimator/>

NOTES: