

# AMR Tax Services, Inc.

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[www.amrtax.com](http://www.amrtax.com)

January 01, 2015

Dear Friends,

Thank you all so much for a successful tax season last year. Each year brings new growth and possibilities. This is another exciting year and we look forward to seeing you.

AMR would like to congratulate Vickie Briscoe for passing the IRS Special Enrollment Exam. Adam and Vickie are both an Enrolled Agent. Being an Enrolled Agent, they can represent anyone for any reason before the IRS.

The 2014 tax year has the most changes of any recent year. Chief among these are the requirements of the Affordable Care Act. We will need proof of insurance for each person listed on your return. *Your insurance card is NOT proof.*

The word from IRS, is tax filing will begin on January 20, 2015. We sure hope so...We believe with all the changes this year, significant delays in processing are bound to happen. In addition.....IRS is conducting extensive identity theft checks this year. We believe this will result in further delays in processing. The IRS Commissioner is on record saying we will have a "miserable" tax filing season.

We (AMR) have many additional compliance requirements and may need to make additional copies of your records. We will need to make a copy of your ID. Be sure to bring a copy of your spouse's ID if they are not coming to the appointment. Please help us by taking the time to fill out a worksheet even if you have not in the past.

We have online booking available through our website. For those we served last year, you are already registered. You can log in using your last name as the user name and your house number as the password or you may use the user name and password you have created. When you book online you will receive a confirmation e-mail and a reminder the day before your appointment. Please refer your friends to our web site: [www.amrtax.com](http://www.amrtax.com).

AMR Tax Services, Inc. is an Authorized E File Provider and we are **REQUIRED** to E-File all our returns. Please be sure to verify the names and social security numbers on your return. The IRS verifies these on all returns. If these items are wrong, there could be a delay in the amount of time it takes you to receive your refund. **EARNED INCOME CREDIT RECIPIENTS SHOULD BE AWARE THE IRS IS EXPANDING THE EIC VERIFICATION CHECKS. THIS COULD RESULT IN A DELAY IN THE REFUND FOR EARNED INCOME CREDIT.** If you owe any amounts to the IRS or Oklahoma Tax Commission, you have until April 15, 2014 to pay even though your return has already been filed.

We look forward to seeing you during this filing season. Please book your appointments in advance whenever possible. Use our online scheduling at [www.amrtax.com](http://www.amrtax.com).

Respectfully,



Adam Roberts EA  
President

Name	SS#	<u>DEPENDENTS</u> Relationship	Birth-date	College Tuition

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**DON'T FORGET AMR'S REFERRAL PROGRAM. CASH BACK TO YOU FOR YOUR REFERRALS  
NO COUPON REQUIRED.**

List **INTEREST** and/or **DIVIDEND** income by source and amount (Please Bring The 1099 Forms):

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

List **Other Income:** \_\_\_\_\_ \$ \_\_\_\_\_

List **UNEMPLOYMENT COMPENSATION RECEIVED**.....Husband or Single \$ \_\_\_\_\_ Wife..... \$ \_\_\_\_\_

List **SOCIAL SECURITY BENEFITS RECEIVED**..... Husband or Single \$ \_\_\_\_\_ Wife.....\$ \_\_\_\_\_

List amounts **contributed** to **IRA ACCOUNTS** ..... Husband or Single \$ \_\_\_\_\_ Wife.....\$ \_\_\_\_\_

**Check Box** if you **Itemized Your Deductions** last year.....

**Student Loan Interest Paid**.....\$ \_\_\_\_\_

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**MEDICAL EXPENSES:** Please **DO NOT** include amounts paid by **PRE-TAX PAYROLL DEDUCTION**. (Cafeteria Plan)  
Did you have Medical Insurance? We will need proof of coverage. Your insurance card is NOT proof of coverage.

PRESCRIPTION DRUGS \$ \_\_\_\_\_ HOSPITALIZATION INS. \$ \_\_\_\_\_ DENTAL ..... \$ \_\_\_\_\_  
EYE GLASSES..... \$ \_\_\_\_\_ HOSPITALS ..... \$ \_\_\_\_\_ DR. \_\_\_\_\_ \$ \_\_\_\_\_  
MISCELLANEOUS..... \$ \_\_\_\_\_ DR. \_\_\_\_\_ \$ \_\_\_\_\_ MEDICAL EQUIPMENT \$ \_\_\_\_\_

**TAXES PAID:**

REAL ESTATE TAX..... \$ \_\_\_\_\_ EXCISE TAX \$ \_\_\_\_\_ \$ \_\_\_\_\_  
ADDITIONAL STATE TAX PAID WITH LAST YEARS RETURN \$ \_\_\_\_\_ \$ \_\_\_\_\_

**HOME MORTGAGE INTEREST** (List Mortgage Company or individual and amount)

\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**CHARITABLE DONATIONS** (List Non-Profit Organization and amount)

CHURCH..... \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
UNITED WAY/CFC.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**MISCELLANEOUS EXPENSES**

UNION DUES..... \$ \_\_\_\_\_ PROF. BOOKS..... \$ \_\_\_\_\_ TOOLS FOR JOB..... \$ \_\_\_\_\_  
SAFETY SHOES ..... \$ \_\_\_\_\_ GLOVES..... \$ \_\_\_\_\_ UNIFORM EXPENSES... \$ \_\_\_\_\_  
PROF. EDUCATION.... \$ \_\_\_\_\_ SAFE DEPOSIT BOX..... \$ \_\_\_\_\_ TAX SERVICE FEE..... \$ \_\_\_\_\_

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**TRAVEL OR AUTO EXPENSES INCURRED ON YOUR JOB**

MOTELS & AIRFARE.....\$ \_\_\_\_\_ CAR RENTAL.....\$ \_\_\_\_\_ TOTAL MILEAGE..... \_\_\_\_\_  
MEALS (ACTUAL AMOUNT OR NUMBER OF DAYS AWAY)..... \$ \_\_\_\_\_ BUSINESS MILEAGE.... \_\_\_\_\_  
LONG DIST/CELLULAR...\$ \_\_\_\_\_ INSURANCE, REPAIRS, GAS, OIL, ETC..... \_\_\_\_\_  
PARKING & TOLLS \$ \_\_\_\_\_ LOCAL TRANSPORTATION (Taxi, Bus, Train, etc).....\$ \_\_\_\_\_

**ENERGY EFFICIENT HOME IMPROVEMENTS:**

WINDOWS....\$ \_\_\_\_\_ STORM DOORS....\$ \_\_\_\_\_ HIGH EFFICIENCY HVAC SYSTEM (16 SEER OR BETTER)....\$ \_\_\_\_\_  
INSULATION.\$ \_\_\_\_\_ OTHER.....\$ \_\_\_\_\_ HIGH EFFICIENCY WATER HEATER (16 SEER OR BETTER)..\$ \_\_\_\_\_

**CHILD CARE EXPENSES** LIST NAME, ADDRESS, SOCIAL SECURITY NO. OR FEDERAL ID NO. OF PROVIDER AND AMOUNT PAID

LIST AMOUNTS PAID THROUGH **PRE-TAX PAYROLL DEDUCTION**...(CAFETERIA PLAN) .....\$ \_\_\_\_\_

NAME	ADDRESS	ID NUMBER	AMOUNT PAID

**RENTAL INCOME AND EXPENSES** (Worksheet available if more than one property)

INCOME COLLECTED...\$ \_\_\_\_\_ LEGAL EXPENSE\$ \_\_\_\_\_ REAL ESTATE TAXES.... \$ \_\_\_\_\_  
ADVERTISING..... \$ \_\_\_\_\_ UTILITIES..... \$ \_\_\_\_\_ MORTGAGE INTEREST \$ \_\_\_\_\_  
TRAVEL EXPENSES..... \$ \_\_\_\_\_ REPAIRS..... \$ \_\_\_\_\_ CLEANING & MAINT.... \$ \_\_\_\_\_  
INSURANCE..... \$ \_\_\_\_\_ SUPPLIES..... \$ \_\_\_\_\_ \_\_\_\_\_ \$ \_\_\_\_\_