

4. Investment Interest Paid:

Paid To: _____ \$ _____

5. Profit Sharing Distribution

a) Date Distribution Received _____

b) Your Contribution \$ _____

c) Company Contribution \$ _____

6. Pension: Bring Forms 1099R

You: \$ _____ Spouse: \$ _____

Pension: Rollover: Bring Form 1099R

You: \$ _____ Spouse: \$ _____

7. IRA Distribution Received: Bring Form 1099R

You: \$ _____ Spouse: \$ _____

8. IRA Contribution:

You: \$ _____ Spouse: \$ _____

9. IRA Rollovers: Bring Form 1099R

You: \$ _____ Spouse: \$ _____

10. Roth IRA / MYRA Contribution:

You: \$ _____ Spouse: \$ _____

11. Gambling Winnings: \$ _____**12. Social Security: Bring Form SSA-1099**

You: \$ _____ Spouse: \$ _____

13. Any other income we should be aware of.

Type: _____ Amount: \$ _____

14. Lottery Winnings: Bring Form W-2G**15. Were any debts discharged during the year? (Bankruptcy, Etc.) Yes / No** Amount: \$ _____**16. Bring information if your dependent, under 24, has unearned income of \$1050 or more during the year****17. Do you have any household employees? Yes / No****18. Do you have any unreported CA. Sales and Use Tax to report? Yes / No** Amount: \$ _____**19. Student Loan Interest Paid:** \$ _____**20. Did you do a Roth conversion? Yes / No** Amount: \$ _____**Medical Expense:**

Prescriptions \$ _____

Doctors, Dentists, Nurses & Co-Pay \$ _____

Hospital & Nursing Homes \$ _____

Medical Ins. Premiums \$ _____

Long Term Care Premiums \$ _____

Long Term Care Premiums (Spouse) \$ _____

Glasses, X-Rays & Lab Fees \$ _____

Other-Hearing Aids, ETC. \$ _____

Miles For Medical Care _____**Contributions:****Checks****Receipts**

Church \$ _____ \$ _____

Payroll Ded. \$ _____ \$ _____

Other \$ _____ \$ _____

Non-Cash Contributions:**FMV**

Goodwill \$ _____

Other \$ _____

Car donations: Bring Required Form 1098-C**All cash contributions require written substantiation from that organization. Checks under \$250. are acceptable.**

Charity Travel _____ Mi

Misc. Work Related Deductions:

Union Dues \$ _____

Tax Preparation \$ _____

Safe Deposit Box \$ _____

Job Related Books & Manuals \$ _____

Job Related Cellular Phone \$ _____

Job Related Telephone Calls \$ _____

Job Related Education \$ _____

Job Related Education Miles _____ Mi

Entertainment \$ _____

Job Seeking Exp (list separately) \$ _____

Laundry - Uniforms \$ _____

Small Tools for Work \$ _____

Uniforms (not gen. wear) \$ _____

Credit Card Fees to pay your taxes \$ _____

Investment Expenses \$ _____

Taxes:

Property Tax (Pers. Residence) \$ _____

Property Tax (Land, 2nd Prop) \$ _____

Auto Registration (No. of Vehicles ____) \$ _____

Pers. Prop Tax (Boat, etc.) \$ _____

Sales Tax (Car, Boat, Airplane) \$ _____

Hero Program (Bring Tax Bill)

Interest Paid:Home Mtg: **Bring Form 1098 from Mortgage Holder**

Mortgage Co. _____

\$ _____

Home Mtg: Paid to Individuals \$ _____

Name: _____ SSN: _____

Address: _____

21. Energy Credits

Solar Energy

(Bring Contract) Amount \$ _____

Hybrid or Electric Vehicle Credit:

(Bring Contract) Date Purch: _____

Amount \$ _____

22. Special Teachers Deduction

Amt paid for teaching supplies \$ _____