

**2008 PERSONAL TAX DEDUCTION WORKSHEET**

Name \_\_\_\_\_  
 D.O.B. \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# \_\_\_\_\_  
 Occupation \_\_\_\_\_

Spouse Name \_\_\_\_\_  
 D.O.B. \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# \_\_\_\_\_  
 Occupation \_\_\_\_\_

Phone- Home \_\_\_\_\_ CIRCLE ONE  
 Work \_\_\_\_\_ (Taxpayer/Spouse)  
 Cell \_\_\_\_\_ (Taxpayer/Spouse)

Email Address \_\_\_\_\_

Address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**INCOME CHECKLIST**

*(Attach Documentation)*

Wages (W-2's)  \_\_\_\_\_  
 Dividend Income (1099-DIV) \_\_\_\_\_  
 Interest Income (1099-INT) \_\_\_\_\_  
 State Refunds (1099-G) \_\_\_\_\_  
 Gambling Income (W-2G) \_\_\_\_\_  
 HSA/MSA Distributions (1099-SA) \_\_\_\_\_  
 Home Sale (1099-S) \_\_\_\_\_  
 IRA/Pension Pymts (1099-R) \_\_\_\_\_  
 Social Security (SSA-1099) \_\_\_\_\_  
 Stock Sales (1099-B) \_\_\_\_\_  
 Unemployment (1099-G) \_\_\_\_\_  
 Alimony \_\_\_\_\_  
 Jury Duty \_\_\_\_\_  
 Schedule K-1's \_\_\_\_\_  
 1099-Misc \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**DEPENDENTS**

Name	D.O.B.	SS# (Please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____

**ESTIMATED TAXES PAID**

DATE	IRS	STATE
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
TOTAL	_____	_____

**CHILD CARE CREDIT**

Name & Address of Provider	SS#	Amount Paid
_____	_____	_____
_____	_____	_____

(Please breakdown amounts paid per child)

**PENSION PLANS**

[not 401(k)]

Contributions for current year

	<i>Individual</i>	<i>Spouse</i>
IRA	\$ _____	\$ _____
ROTH-IRA	_____	_____
SEP/SIMPLE IRA	_____	_____
Conversion of Regular IRA to ROTH-IRA in 2008	_____	_____

**EDUCATION CREDITS (Form 1098-T)**

**HOPE & LIFETIME LEARNING CREDIT**

Student Name	Tuition & Fees Paid
1) _____	_____
2) _____	_____

Is student taking at least 1/2 credits of full-time status?	Has student completed at least 2 years of postsecondary education?
1) Y N	1) Y N
2) Y N	2) Y N

**STUDENT LOAN INTEREST (Form 1098-E)**

Amount paid \$ \_\_\_\_\_

**STIMULUS PAYMENT**

Amount received in 2008 \$ \_\_\_\_\_

**MEDICAL/HEALTH SAVINGS ACCOUNT CONTRIBUTIONS**

2008 Contributions to: (Circle which)

	<i>Individual</i>	<i>Spouse</i>
MSA	\$ _____	\$ _____
HSA	\$ _____	\$ _____