



Client: _____

INCOME	
W-2	Wage Statements _____
1099-INT	Interest _____
1099-DIV	Dividends _____
1099-MISC	Self-Employment Income _____
1099-R	Pension, IRA _____
W-2G	Gambling, Lottery _____
1099G	Unemployment _____
1099G	State/City Tax Refund _____
1099B	Investment Sale* _____
1099S	Property Sale* _____
K-1 for	
	Partnership _____
	Limited Partnership _____
	S-Corporation _____
	Trust _____
	Estate _____
SSA-1099	Social Security _____
RRB-1099	Railroad Retirement _____
Alimony	_____
Tips	_____
Scholarships	_____
Jury Duty	_____
Tax Exempt Interest	_____
Property Tax Rebate Recovery	_____
Foreign Earned Income	_____

*For investment and property sales we need purchase date, cost, and closing statements.

OTHER DEDUCTIONS/CREDITS	
1098 E: Student Loan Interest	_____
1098 T: College Tuition/Fees/Books (Midwest Disaster Area?)	_____
Alimony Paid	_____
Moving Expenses	_____
Child Care Expenses (We need provider's name, address, and tax ID number)	_____
IRA/SEP/SIMPLE Contributions	_____
Roth IRA Contributions or Conversion	_____
Teacher's Classroom Expenses	_____
Health Savings Account Contributions	_____
Adoption Expenses	_____
Homebuyer Credits (need copy of settlement statement)	_____
Retirement Saver's Credit	_____
Residential Energy Improvements	_____

SCHEDULE A DEDUCTIONS	
Medical, Dental, & Optical (Total must exceed 7.5% of income to be deductible)	
Prescription Drugs	_____
Health Insurance Premiums (you paid)	_____
Long Term Care Insurance	_____
Number of Medical Miles	_____
Doctor, Dental, Hospital and Lab Fees	_____
Vision, Eyeglasses, and Contacts	_____
Taxes	
Sales Tax (cars, boats, RVs)	_____
New Car Purchase (after 2/16/09)	_____
Primary Residence Taxes <i>Paid*</i>	_____
Other Property Taxes	_____
Auto License Plate Tags**	_____
Interest	
Home Mortgage Interest	_____
Home Equity Loans	_____
Investment Loans	_____
Mortgage Insurance Premiums (For new mortgages in 2007, 2008 or 2009 only)	_____
Contributions	
Cash, Check, and Payroll Deductions	_____
(You must provide written receipts for all)	
Goods	
(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5000, you need appraisal)	
Miscellaneous (Total must exceed 2% of income to be deductible)	
Job Related Mileage	_____
Job Related Books and Tuition	_____
Job Seeking Expenses	_____
Job Equipment, Uniforms	_____
Investment Expenses	_____
Safe Deposit Box	_____
Union/Professional Dues	_____
Tax Preparation Fees	_____
Theft/Casualty Loss	_____
Gambling Losses (Cannot exceed winnings)	_____

* Please bring property tax bills you received and those you paid.
**Find amount paid on vehicle registration.

OVER →