2008 PERSONAL TAX DE	DUCTION WORKSHEET
Name	INCOME CHECKLIST
D.O.B. // SS# Occupation	(Attach Documentation) Wages (W-2's) Dividend Income (1099-DIV)
Spouse Name	Interest Income (1099-INT) State Refunds (1099-G) Gambling Income (W-2G)
Phone- Home CIRCLE ONE Work (Taxpayer/Spouse) Cell (Taxpayer/Spouse)	HSA/MSA Distributions (1099-SA) Home Sale (1099-S) IRA/Pension Pymts (1099-R) Social Security (SSA-1099) Stock Sales (1099-B)
Email Address	Unemployment (1099-G) Alimony Jury Duty
Address	Schedule K-1's 1099-Misc
Name DEPENDENTS D.O.B. SS# (Please verify)	ESTIMATED TAXES PAID DATE IRS STATE
CHILD CARE CREDIT	
Name & Address SS# Amount Paid of Provider (Please breakdown amounts paid per child)	TOTAL
	<u>PENSION PLANS</u> [not 401(k)] Contributions for <u>current</u> year
EDUCATION CREDITS (Form 1098-T) HOPE & LIFETIME LEARNING CREDIT	Individual Spouse
Student Name Tuition & Fees Paid 1)	IRA \$ \$ ROTH-IRA
2)	SEP/SIMPLE IRA
full-time status? postsecondary education?	IRA Conversion of Regular IRA to
1) Y N 1) Y N 2) Y N 2) Y N	ROTH-IRA in 2008
STUDENT LOAN INTEREST (Form 1098-E) Amount paid \$	MEDICAL/HEALTH SAVINGS <u>ACCOUNT CONTRIBUTIONS</u> 2008 Contributions to: (Circle which)
	Individual Spouse MSA \$ \$
STIMULUS PAYMENT Amount received in 2008 \$	HSA \$ \$