



## INCOME/ITEMIZED DEDUCTIONS

**CHECK ALL THAT APPLY AND BRING STATEMENTS**

Wages, Sick Pay, Etc		Pension & IRA Withdrawals	
Interest & Dividends		Rental Income & Expenses	
Alimony Received		Farm Income & Expenses	
Unemployment Compensation		Self Employment Income & Expenses	
Social Security		Sale of Stock, Land, Etc	
Lottery/Gambling Winnings		Other Income (List Source & Amount)	

### ITEMIZED DEDUCTIONS

MEDICAL & DENTAL	Husband	Wife	GIFTS TO CHARITY	Husband	Wife
Health Insurance Premiums			(Attach Receipts)		
Prescriptions & Medicings			Total Gifts by Cash or Check		
HSA Distributions - BRING STATEMENT - 1099SA			Charitable Miles		
Dental Expenses			Other than by Cash or Check		
Medical Miles Driven					
Long Term Care Insurance Premiums					

TAXES YOU PAID	JOB EXPENSES (List):
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State & Local Taxes	Do you get car allowance (bring)
Sales Tax/Sales Tax on New Vehicle	*Parking
Real Estate Tax	*Business Miles
Personal Property Tax	

MORTGAGE	2ND MORTGAGE OR LOC
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Mortgage Interest	Start date & how much
Balance on mortgage	Who is it with

DEDUCTIONS & CREDITS: Check Those That Apply	Husband	Wife
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Teaching Supplies (K-12 Teachers Only)	\$	\$
IRA Contributions <input type="checkbox"/> Roth <input type="checkbox"/> Traditional	\$	\$
Alimony Paid Recipient's Name _____ Soc.Sec. No. _____	\$	\$
Student Loan Interest	\$	\$
Health Savings Account Contributions (Bring Statements)	\$	\$
Moving Expense (Bring Itemized List )(Armed Forces)	\$	\$
Self Employed Health Insurance Premiums	\$	\$
SEP, Simple & Other Pension Contributions	\$	\$
Child Care Expenses Babysitters Name _____ Address _____ Soc.Sec. No. _____ Fed ID No _____	\$	\$
Investment Interest (Bring Statements)	\$	\$
Tuition / Fees / Educational Expenses (Bring Statements)	\$	\$
	\$	\$
	\$	\$

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