Tax Return Information Sheet

Name/Address

_____ ___-___-_____
_____ ___-___-_____
_____ Date of Birth
_____ Husband _____
_____ Wife _____

Same New Client ID Phone: Home _____
Email _____ Work _____

___ Claimed by another
___ Under age 18
___ Form 8332

Single / Joint / Head of Household
Married separately:
Name:_____
SS#:_____

Dependents	Date of Birth	SS#	Relationship	# Mos. in home

Income

Wages—Bring W-2.
Interest & Dividends—Bring 1099.
Unemployment—Bring statement.
State tax refund—Bring statement
Alimony received.
Pensions—Bring statement.
Social Security—Bring statement.

Interest Paid

Home mortgage—To financial institutions. $_____
Home mortgage—To individuals: $_____
Name _____ Address _____
Mortgate Ins. Premiums $_____
Points pd. on refinancing house _____ Loan for _____ yrs.
Investment Interest Paid $_____

Contributions*

By cash or check $_____
Other than by cash/ck. $_____
(Need receipt if over $500)

Medical expenses

Medical and dental expenses $_____
Transportation _____ miles for medical.
Medical insurance premiums paid $_____
Nursing home insurance paid $_____

Credits

IRA payments (Roth/Traditional)
(Include total pmts. for year)
Husband $_____
Wife $_____
SEP payments $_____
Penalty on early withdrawl of savings $_____
Alimony paid to:
Name:_____
SS# of recipient ___-___-___
Moving expense $_____

Miscellaneous

Union dues $_____
Tax preparation $_____
Uniforms/shoes $_____
Safety equipment $_____
Work tools $_____
Job supplies $_____
Job hunting $_____
Safe deposit box $_____
Education/employ fee $_____
Investment fee/publ. $_____
Subsistence pay _____ days

Taxes paid

House (real estate) $_____
Personal property (car, etc.) $_____

Business travel expenses

Meals $_____
Lodging $_____
Other_____ $_____
Log book? Yes No
Total miles _____miles
Business miles _____miles

Child care

Name of Babysitter	Address	ID# or SS#	Amount Paid

Additional Information

Student loan interest paid_____ Teacher supplies _____
Volunteer fireman, EMS, hazmat_____
Use Tax--Amazon _____
SC 529 plan _____
Qualified Energy Credit _____ Credit Protection _____
If you have over $10,000 in foreign bank account, check here. _____
Did you get 1099 K? _____

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Estimated Income Tax Payments

	U.S.	S.C.
4/15/15	_____	_____
6/15/15	_____	_____
9/15/15	_____	_____
1/15/16	_____	_____