

Tax Return Information Sheet

Name/Address		— Claimed by another
		Under age 18
		Form 8332
		Single / Joint // Head of Household Married separately:
Same	Date of Birth Husband Wife	Name:
	Phone: Home	SS#:
Email	Work	

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

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** _____
Points paid on refinancing house _____ **Loan for** _____ **years**
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 _____
 Investments _____
SEP payments
Penalty on early withdrawal
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#	Amo20untBPaid

Additional Information
 Student loan interest paid _____ Teacher supplies (\$250 max) _____
 Volunteer fireman, EM hazmat _____
 SC 529 plan _____
 Credit Protection _____
 Do you have over \$10,000 in a foreign bank account YES NO
 Did you get 1099K ? _____

Estimated Income Tax Payments

4 / 1 5 / 1 7	_____	_____
6 / 1 5 / 1 7	_____	_____
9 / 1 5 / 1 7	_____	_____
1 / 1 5 / 1 8	_____	_____