Tax Return Information Sheet

Name and Address

Claimed by another
Under age 18
Form 8332

Date of Birth
Husband
Wife

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

Email _____ **Phone: Home**
Work
Mobile
Email _____

Dependents	**Date of Birth**	**SS#**	**Relationship**	**Mos. in home during year**

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 **$**_____
Mortgage Interest Premiums **$**_____

Contributions*

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

Medical expenses

Medical and dental expenses _____
Medical Miles _____
Medical insurance premiums paid _____
Nursing home insurance paid _____

Stimulus Money
Amt Received in 2020
_____
Amt Received in 2021
_____

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 _____
Date of Divorce _____
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 ($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 / 20	_____	_____
6 / 1 5 / 20	_____	_____
9 / 1 5 / 20	_____	_____
1 / 1 5 / 2 1	_____	_____

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