FREE ELECTRONIC FILING · TAX PREPARATION FOR ALL STATES

INDIVIDUAL Tax Worksheet

Name: ____________ SS # ____________ Tax Year: ______

What to Bring:

- If you are a **NEW CLIENT** to us, please bring a copy of last year's return
- List of each person's name, date of birth and social security number ***(if NEW BIRTH or NEW CLIENT bring SOCIAL SECURITY CARD)***

PROOF OF INCOME EARNED

- **All sources of income:** W2 Forms, 1099 Forms, K-1 Forms, interest/dividends earned statements, alimony or spousal support, unemployment benefits, social security statements, awards, bonuses etc.
- Income and/or Interest from Investments
  Did you sell any stock, funds, contracts for deed or real estate? Bring **ORIGINAL cost & date purchased, date of sale and proceeds.** Bring documentation for dividends, interest and stock sales. (1099 statements)
- Unemployment received? $ ____________
- Social Security? $ ____________
  (bring forms)
- Documentation of all other forms of income
  (1099-Misc., Foreign Income, etc.)

EXPENSES

- Total Medical Expenses: $ ____________
  include mileage & parking **(Must exceed 7.5% of income to count)**
- Mortgage Interest Paid: $ ____________
- Property Taxes Paid: $ ____________
  Interest on a Contract for Deed requires you to bring Name, Address and SS# of Contract Holder.
- Closing Papers from all Purchases, Sales, Refinances
  NEW: Bring ALL old refinance papers AND AMOUNTS OF REFINANCE used to make home improvements.
- 2010 & 2011 Property Tax Statements and/or 2010 CRP Form

- Contributions: Cash/Check $ ____________
  Non-Cash (worksheets) ____________
  Non-cash charitable contributions must be listed. (eg. 5 Blouses - $?? value, sofa - $?? value) use back side or attach listing to this sheet.
- Union Dues $ ____________
- Unreimbursed Job Expenses $ ____________
  See 18 Miscellaneous info sheet
  - Moving Expenses $ ____________
  (If you moved 50+ miles because of a new job)
- DayCare/Preschool Expenses
  Paid $ ____________
  Please bring Name, address AND Social Security Number or Fed ID # for Day Care Provider
- Education Expenses
  for K-12 Dependents $ ____________
  (who, what, why, amount) ____________
- College/Technical Education Expenses
  for Self or Dependent $ ____________
  (including tuition and/or books)
- Student Loan Interest **Paid** ____________
  must be PAID not incurred

OTHER ITEMS TO REMEMBER

- IRA, SEP or
  KEOGH Contributions $ ____________
  Withdrawals $ ____________
  Rollovers $ ____________
  Please bring documentation of any such transactions.
- If you received funds from any non-taxable Foreign Sources, you must report to avoid a Penalty, but it will remain tax free.
- Children under 18 (19-23 if full-time students) need to file a return if their income or investment sales and/or transfers exceeded $1900.00. (We will file your dependent children's tax returns starting as low as $35.00).

Use back side to list any additional information - attach all other documentation.

03 Individual Worksheet
2010 Tax Period

ALL FEES PAYABLE AT TIME OF SERVICE OR PRIOR TO E-FILING • CASH, CHECK, CREDIT CARD

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