

Tax Year _____ Record Saver

INCOME & DEPENDENTS

DIVIDENDS (Bring 1099s)		
Corp. Name	Amount	Amount

INTEREST (Bring 1099s)		
Rec'd From	Amount	Amount

OTHER INCOME

Type of Income	Amount
Alimony	
Pensions & Annuities	
Royalties	
Estates & Trusts (Bring K-1s)	
Jury Duty	
Social Security	
Unemployment Compensation	
Partnerships (Bring K-1s)	

Type of Income	Amount
Tips	
Prizes & Awards	
Hobby	
Scholarships & Fellowships	
State Tax Refund	
S Corporations (Bring K-1s)	
Miscellaneous	

GAINS & LOSSES FROM SALE OF PROPERTY (Bring Purchase and Sales Documents)

Description	Date Bought	Date Sold	Sales Price	Cost

DEPENDENTS

Name	Social Security Number	Birthdate MM/DD/YY	If over 18, student?	Relationship	# of months lived with you

RENTAL PROPERTY	
	Amount
GROSS INCOME	
EXPENSES	
Advertising	
Auto - Travel	
Cleaning & Maint Supplies	
Equip Rental	
Yard Work, Snow Removal	
Commissions	
Insurance	
Interest	
Legal & Acctg	
Office Supplies	
Repairs=R Improvements=I	
Carpentry	
Decorating, Painting	
Electrical	
Plumbing	
Roofing	
Furnace, Air Conditioning	
Taxes	
Utilities	
Heat	
Water	
Electricity	
Telephone	
Bring documents for the purchase or sale of fixtures	

Name _____ Phone _____

Address _____

City/State/Zip _____ Due Date _____

Taxpayer's Social Security Number _____ Spouse's Social Security Number _____

DEDUCTIONS & CREDITS

ADJUSTMENTS		TAXES				CONTRIBUTIONS			MISCELLANEOUS DEDUCTIONS	
Traditional IRA Contribution		State Income Tax Bal. Pd.		State Quarterly Estimate		<input type="checkbox"/> Canceled Check or Receipt Amount CK Recp			Dues & Subscriptions	
Roth IRA Contribution		1st 2nd 3rd 4th		Church			Education			
Self Employed Health Ins		Local Income Tax		Heart			Job Seeking Expense			
Keogh, SEP, and SIMPLE		Pers. Prop. - State		Cancer			Uniforms			
Forfeited Interest		Pers. Prop. - City		United Fund			Business Entertainment			
Alimony Paid		Real Estate - State		Others			Vehicle Expense			
Moving Expenses		Real Estate - City					Tolls & Local Transp.			
MSA		Other					Legal & Acctg.			
FEDERAL TAXES							Custodial Fees			
Fed. Income Tax Bal. Pd.							Investment & Tax Advice			
Federal Quarterly Estimate							Safe Deposit Box			
1st 2nd 3rd 4th							Hobby Losses			
MEDICAL							Impairment Related Work Expenses			
Drugs & Medicines							Amortizable Bond Premium			
Medical Insurance Premiums							Gambling Losses			
Doctors, Dentists, Etc.							Other			
Hospitals, Clinics, Etc.							EDUCATION CREDITS			
Hearing Aids & Batteries							(Bring 1098-T)			
Glasses & Contact Lenses							Tuition Paid			
Transportation, Parking										
Other										
Reimbursement										
							CASUALTY LOSSES			
							(Fire, Lightning, Wind, Water, Car Accidents & Theft)			

CHILD & DEPENDENT CARE

Provider's Name	Address	I.D. #
Amount Paid		