

<u>INTEREST INCOME</u>	(bring all 1099's)	Amount	<u>DIVIDEND INCOME</u>	(bring all 1099's)	Ordinary	Qualified	Cap. Gain
_____		\$ _____	_____		\$ _____	_____	_____
_____		_____	_____		_____	_____	_____
_____		\$ _____	_____		\$ _____	_____	_____

OTHER INCOME

Any State Tax Refunds Received last year: **Yes or No** \$ _____ **Amount Taxable? (if any)** \$ _____

Alimony Received: *From:* TP \$ _____ SP _____

Unemployment Compensation: *Received or Repaid:* TP _____ SP _____

Social Security Received: TP _____ SP _____

Tip Income / Gambling Winnings / Bonds / Stock Sales (*bring all stock basis info.*) _____

Partnerships / Retirement / IRA Distributions (*bring all 1099-Rs, K-1s, etc.*) \$ _____ \$ _____

CHILD AND DEPENDENT CARE EXPENSES

Please let us know if your employer provided dependent care benefits or if the children are cared for in your own home.

<u>Provider #1</u>		<u>Provider #2</u>	
Name _____	_____	Name _____	_____
St. Address _____ Ph: _____	_____	St. Address _____ Ph: _____	_____
City, State, Zip _____	_____	City, State, Zip _____	_____
SSN / EIN: _____ Amt Paid: _____	_____	SSN / EIN: _____ Amt Paid: _____	_____

SCHEDULE 'A'

Complete "only" if the cumulative total is more than your standard deduction of:

Single, (& Married Filing Separate) = \$5,700 **Married Filing Joint = \$11,400** **Head Of Household = \$8,350**

MEDICAL EXPENSES (to be reduced by 7.5% of your Adjusted Gross Income)

Prescriptions (4) \$ _____	Health Ins Premiums (7) \$ _____	Lab fees/ hearing aids (10) \$ _____
Total doctors, dentists (5) _____	INS. REIMBURSED (8) _____	Glasses/contacts/Lasik (10) _____
Hospitals, clinics (6) _____	Parking/Tolls: (9) _____	Medical Miles: (52) _____

TAXES PAID

Real Estate Taxes: Home _____ (2nd Home or Time-Share) _____ (15) \$ _____

State Estimated Tax paid in Jan. (11) _____ Previous Year's State Taxes paid (Year: _____) (14) _____

Vehicle Lic. Fee: auto, trailer, boat, RV #1 _____ #2 _____ #3 _____ #4 _____ #5 _____ #6 _____ (18) _____

Personal Prop.(Boat) Tax (18) _____ Sales Tax on Vehicles, Boats, etc. #1 _____ #2 _____ (93) \$ _____

HOME MORTGAGE LOAN INTEREST (1098-Mortgage Interest)

1: _____ \$ _____ # 4: _____ \$ _____

2: _____ # 5: _____

3: _____ # 6: _____

Points on 1098 _____ \$ _____ Total Interest & Points reported on 1098 (21) _____

Mort. int. pd to a person: Name/Address/SSN: _____ (22) _____

Points Paid on Refi. or New Home (not on 1098) _____

Qualified Mortgage Insurance Premiums Paid (39) \$ _____ Total Interest & Points pd on Refi/New Home (23) \$ _____

CONTRIBUTIONS (bring a Detailed List along with Donation Receipts, Appraisals, and/or Letters from Charities)

Cash: Church: _____ \$ _____ Misc: _____ \$ _____ (32) \$ _____

Payroll & Out of Pocket Deductions: (teaching, scouts, coaching, etc) To: _____ \$ _____ (31) _____

NonCash Donations: #1 _____ \$ _____ #2 _____ \$ _____ (33) _____

Charitable Travel: (school, scouts, coaching, church, etc.) **Charity:** _____ **Miles:** (53) _____ **Total:** \$ _____

MISCELLANEOUS (to be reduced by 2% of AGI)

Prof / Union Dues (42) _____	Business journals (43) _____	Job seeking exp. (43) _____	Tax prep. Fee (45) _____
Job related school (43) _____	Teaching Supplies (55) _____	Supplies / tools (43) _____	Safe deposit box (46) _____
Investment/IRA fees (44) _____	Uniforms/safety gear (43) _____	Cell phone (43) _____	Legal fees (47) _____
Unreimbursed travel (43) _____	or # Of days traveled _____	& # Of travel meals _____	Moving expenses _____