



Income Tax Information

Taxpayer Name _____ SSN _____ Birth Date _____ Spouse Name _____ SSN _____ Birth Date _____
 Address _____ Phone _____
 Email Address _____

Dependents _____ SSN _____ Birth Date _____ Relationship _____ Months lived with you? _____

**In order to claim earned income credit, we must have documentation for our files that proves your child lives with you.
 This includes medical, school or church records, rental agreements or any other documentation which you have.**

INCOME

W2 WAGES _____
 SOCIAL SECURITY _____
 1099 INT (INTEREST) _____
 1099 DIV (DIVIDENDS) _____
 1099R (PENSION OR RETIREMENT) _____
 1099G (UNEMPLOYMENT) _____
 1099G (STATE OR CITY REFUNDS) _____
 SELL STOCKS OR BONDS? Need 1099B with cost basis _____
 OWN RENTAL PROPERTY? (Separate income sources) _____
 W2G (GAMBLING WINNINGS) _____
 FARM INCOME? _____
 SELF EMPLOYED? _____
 ALIMONY/OTHER _____
 CHILD SUPPORT _____

CREDITS AND ADJUSTMENTS

TAXPAYER IRA _____
 SPOUSE IRA _____
 ESTIMATED TAX PMTS \$ FED PMTS AND DATES _____
 STATE ESTIMATED PAYMENTS AND DATES _____
 CITY ESTIMATED PAYMENTS AND DATES _____
 COLLEGE TUITION: STUDENT, COLLEGE, \$ LOAN OR PAID
Need 1098T and/or 1098E
 HEALTH SAVINGS ACCT: \$ IN AND \$ OUT
Need HSA documents - 1099SA
 CHILD CARE: NAME, ADDRESS, SSN, \$ PAID _____

OTHER

BUY OR SELL YOUR HOUSE (CLOSING DOCUMENTS)? _____
 CREDIT CARD DEBT FORGIVEN? _____
 BANKRUPTCY? _____
 MOVE INTO OR OUT OF CITY WITH INCOME TAX? _____
 MOVE STATES? _____
 BUY CAR? _____
 HOMEBUYERS CREDIT PAYBACK OR SALE? _____
DID YOU RECEIVE A 1099K? _____

DEDUCTIONS

INTEREST:

MORTGAGE (FORM 1098) _____
 DEDUCTIBLE POINTS _____
 STUDENT LOAN (Form 1098E) _____
 OTHER _____

CONTRIBUTIONS: (With receipts only)

CHURCH _____
 CHARITABLE _____
 CHARITABLE MILES _____
 USED CLOTHING OR HOUSEHOLD GOODS _____

TAXES:

HOME PROPERTY TAXES: WINTER 2022 _____
 SUMMER 2023 _____ WINTER 2023 _____
 TAXABLE VALUE OF HOME _____
 COTTAGE OR 2ND HOME _____
 CAR LICENSE PLATES _____
 OTHER / ESTIMATED _____

MEDICAL:

Health Insurance (ACA requires form 1095A)
 Prescriptions _____
 Doctors _____
 Dental _____
 Copays _____
 Glasses/Contacts _____
 Hearing Aids _____
 Medical Miles and Other Medical _____
 Long term care premiums _____

OTHER DEDUCTIONS AND CREDITS:

EDUCATOR EXPENSES _____
 RESIDENTIAL ENERGY CREDIT (WINDOWS, DOORS,
 INSULATION AND ELECTRIC VEHICLES) _____
 INCOME TAX PREPARATION _____
 EMPLOYEE BUSINESS EXPENSES - CERTAIN EMPLOYEES ONLY _____
 GAMBLING LOSSES _____
 OTHER _____