



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 DISTRIBUTIONS) _____

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 _____

QUALIFIED CHARITABLE DISTRIBUTIONS _____

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, 1099Q and/or 1098E** _____

HEALTH SAVINGS ACCT: \$ IN AND \$ OUT _____

Need HSA documents - **5498SA & 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? WE NEED THE INTEREST PAID _____

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 2024 _____

SUMMER 2025 _____ WINTER 2025 _____

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 _____