



## INCOME

1. Did you (or spouse) receive any W2 forms for the year?

Yes                    /                    No

If yes, please attach and list number attached

2. Did you (or spouse) receive any K1 forms for the year?

Yes                    /                    No

If yes, please attach and list number attached

3. Did you (or spouse) receive any Interest Income for the year?

Yes                    /                    No

If yes, please attach 1099-INT forms and list number attached

4. Did you (or spouse) receive any Dividend Income for the year?

Yes                    /                    No

If yes, please attach 1099-DIV forms and list number attached

5. Did you (or spouse) sell any stock during the year?

Yes                    /                    No

If yes, please attach brokerage statement showing purchase information (date / price) and sale information (date / price). Please list how many pages are attached.

6. Did you (or spouse) have any Gambling Winnings for the year?

Yes                    /                    No

If yes, please attach 1099 forms received showing these winnings and list number attached

## **PURCHASE / SALE OF A HOME**

- Did you (or spouse) purchase or sell a home during the year?  
Yes (continue below)            /            No (Skip this Section)

### **Purchase of Home**

- Did you purchase a home during the year?  
Yes (continue below)            /            No (skip to sale section below)
- Please provide RESPA (closing document) and list how many pages the document is

### **Sale of Home**

1. Have you lived there at least 2 of the last 5 years?  
Yes            /            No
2. Purchase Information (Please fill out table below)

<b>Purchase Information</b>	
<b>Purchase Date</b>	
<b>Purchase Price</b>	\$
<b>Cost of Permanent Improvements</b>	\$

3. Please provide RESPA (closing document) for the sale of your home and list how many pages the document is

## Rental Property

1. Did you have any rental property during the year?

Yes (continue below)

/

No (skip this section)

2. Is this the first year you have rental property?

Yes (fill out section 1)

/

No (skip to section 2)

### Section 1

<b>RENTAL PROPERTY INFORMATION</b>	
Purchase Price of Property	\$
Permanent Improvements to Property	\$
Date Started to Rent	
End Date of Rental (if applicable)	

### Section 2

<b>RENTAL PROPERTY INCOME &amp; EXPENSE INFORMATION</b>	
Rental Income for the year	\$
Advertising Expenses	\$
Auto Expense (Travel to/from property)	(miles)
Cleaning Expenses	\$
Repairs & Maintenance Expenses	\$
Homeowners Association Fees	\$
Mortgage Interest	\$
Property Taxes	\$
Legal Fees	\$
Insurance Expense	\$
Supplies Expense	\$

Telephone Expense	\$
Utilities Expense	\$
Commissions Paid	\$
Bank Fees	\$

## Self-Employment Income

1. Are you self-employed or have a sole proprietorship business?  
Yes (continue below) / No (skip this section)

2. Did you receive any 1099 forms from your customers during the year?  
Yes / No

If yes, please attach all 1099-misc forms and list number attached

3. Is this your first year of self-employment or having a sole proprietorship business?  
Yes (fill out section 1) / No (skip to section 1A)

4. Do you have any new equipment costing over \$1,000 that you bought during the tax year?  
Yes (fill out section 2) / No (skip to section 3)

5. Did you office out of your home?  
Yes (fill out section 3) / No (skip to section 4)

Section 1

<b>Vehicles</b>	
Vehicle – Make/Model	
Cost of Vehicle	\$
Date Vehicle Purchased	

Section 1A

<b>Vehicles</b> (Provide Total Amount for the Year)	
Total Miles Driven During the Year	
Total Business Miles Driven During the Year	
Gasoline Expense	\$
Auto Insurance Expense	\$
Registration Fees Paid	\$
Vehicle Repairs / Maintenance Costs	\$

Section 2

<b>Equipment Costing Over \$1,000</b>	
Equipment Cost (Must have cost over \$1,000)	\$
Equipment Purchase Date	

## Section 3

<b>Office In Home</b>	
Total Square Footage of Home or Apartment	
Square Footage of Office Space	
Rent Expense (if applicable)	\$
Home Insurance	\$
Utilities	\$
Association Dues	\$
Home Repairs / Maintenance	\$
Trash Removal	\$

## Section 4

<b>SELF-EMPLOYMENT / SOLE PROPRIETORSHIP INCOME &amp; EXPENSES</b>	
Income from 1099 forms	\$
Income Not from 1099 forms	\$
Purchases of Products to be sold	\$
Advertising Expense	\$
Commissions Paid	\$
Outside Contract Labor Paid	\$
Insurance Expense	\$
Office Rent Expense	\$
Repairs & Maintenance	\$
Supplies Expense	\$

Travel Expense	\$
Meals	\$
Utilities Expense	\$
Salaries & Wages Paid	\$
Payroll Taxes Paid	\$
Legal & Professional Services	\$
Expendable Equipment (Costing less than \$1,000)	\$
General Office Expenses	\$

## **DEDUCTIONS**

### **Section 1 – Home Ownership**

1. Do you currently own a home?  
                                     Yes (continue below) /                                      No (skip this section)

2. Do you have a mortgage on your home?  
                                     Yes                                      /                                      No

If yes, please provide a copy of the 1098 (year-end mortgage statement)

3. Does your mortgage company pay your property taxes?  
                                     Yes                                      /                                      No

- If yes, please look at form 1098 to make sure that property taxes are included
- If no, please provide us with the amount of property taxes paid



**Section 2 – Medical Expense**

1. Did you have any major medical expenses for the year?  
Yes (continue below) / No (skip this section)

<b>Major Medical Expenses</b>	
Prescription Drugs Cost	\$
Hospital Costs	\$
Ambulance Costs	\$
Equipment Costs (prescribed)	\$
Eye Glasses / Contacts	\$
Health Insurance	\$
Long Term Care Insurance	\$

**Section 3 – Charitable Contributions**

1. Did you have any Charitable Contributions during the year?  
Yes (continue below) / No (skip this section)

<b>Charitable Contributions</b>	
Cash Contributions (Any donations over \$500 need a receipt)	\$
Non-Cash Contributions Value (please provide list of items donated)	\$

**Section 4 – Moving Expenses**

1. Did you move during the year?

Yes (continue below)

/

No (skip this section)

<b>Moving Expenses</b>	
Miles from old home to old job (if applicable)	
Miles from old home to new job (if applicable)	
Cost to pack household goods & items	\$
Cost of travel & lodging from old to new house	\$
Amount (if any) reimbursed by employer	\$

**Section 5 – Other Miscellaneous Deductions**

<b>Other Miscellaneous Deductions</b>	
Professional Organization Dues	\$
Uniform Expense (if not paid by employer)	\$
Tax Preparation Fees	\$
Tools Used in Profession (if not paid by employer)	\$
Gambling Losses	\$
Job Hunting Expenses	\$