

TAX DEDUCTION REFERENCE SHEET

TAXPAYER: _____ DATE OF BIRTH: _____

E-MAIL: _____

SPOUSE: _____ DATE OF BIRTH: _____

E-MAIL: _____

W-2 INCOME SOURCES

EMPLOYER	AMOUNT

INTEREST RECEIVED

PAYOR	AMOUNT

SOCIAL SECURITY RECEIVED

SELF	AMOUNT
SPOUSE	AMOUNT

DIVIDENDS RECEIVED

PAYOR	AMOUNT

For Capital Gains and Losses—Attach Details

PENSION AND IRA INCOME

	AMOUNT
IRA Distributions for 1st Time Home Buyers	

ESTIMATED TAX PAYMENTS

DATE	AMOUNT
FEDERAL #1	
FEDERAL #2	
FEDERAL #3	
FEDERAL #4	
FEDERAL EXTENSION	
STATE #1	
STATE #2	
STATE #3	
STATE #4	
STATE EXTENSION	

OTHER INCOME RECEIVED

PAYOR	AMOUNT
Unemployment Compensation	
Alimony Received	
Advanced Child Tax Credit received	
Other (Specify)	

CHILD CARE

Name of Provider
Address of Provider
Provider Identification #
Amount Paid
Name(s) of Dependent(s) Cared for

IRA CONTRIBUTIONS

	TAXPAYER	SPOUSE
Traditional		
Roth IRA		
SEP IRA		

REMEMBER TO ATTACH ALL W-2s AND 1099s

TAX DEDUCTION REFERENCE SHEET

MEDICAL

AMOUNT

Prescription Medicines and Drugs

Doctors, Dentists & Nurses

Hospitals & Nursing Homes

Insurance Premiums

Long-term Care Premiums

Transportation (in Miles) & Lodging costs

Insurance Reimbursements

CONTRIBUTIONS

AMOUNT

Cash Contributions

Non-Cash Contributions

Travel (in miles)

TAXES

AMOUNT

Real Estate Tax

Auto Licenses

Sales Tax (any large purchases?)

Other Taxes

UNREIMBURSED BUSINESS EXPENSE

AMOUNT

Union Dues

Work Tools

Professional Equipment

Uniform Costs

Travel Costs

Entertainment Costs

Auto Mileage: Business

Auto Mileage: Total

Teacher classroom expenses

Other Costs (specify)

INTEREST PAID

MORTGAGE LOANS PAID TO BANK AMOUNT

Name of Bank #11

Principal Balance Interest Paid

Name of Bank #2

Principal Balance Interest Paid

MORTGAGE LOANS PAID TO INDIVIDUALS

Name of Individual

Address of Individual

Social Security Number

Interest Paid

INVESTMENT INTEREST PAID

MISCELLANEOUS

AMOUNT

Subscriptions

Safe Deposit Box

Income Tax Preparation

Job Seeking

Alimony Paid

Adoption Expenses Paid

Did you purchase a New Hybrid Car Yes No

Did you improve your home's energy efficiency Yes No

Are you a Renter? Yes No

Health Savings Account Contributions

EDUCATION EXPENSES

AMOUNT

Student Loan Interest Paid

College Tuition Paid

Year of Tuition (1st or 2nd)