

IF YOU ARE PLANNING A VACATION OR EXTENDED TRIP AWAY FROM HOME DURING TAX SEASON, BE SURE TO LET US KNOW THE DATES THAT YOU WILL BE GONE AND HOW WE CAN CONTACT YOU.

**BRING TO YOUR TAX APPT OR INCLUDE WHEN YOU DROP OFF YOUR TAX INFORMATION, ALL W-2'S, 1099 FORMS, 1098 FORMS, K-1 FORMS OR ANY OTHER INFORMATION FORMS THAT YOU RECEIVE.**

## INCOME TAX DATA ITEMIZER

Taxpayer's name		Social Security #	
Spouse's name		Social Security #	
Taxpayer's occupation		Birth date	Blind?
Spouse's occupation		Birth date	Blind?
Address			
Phone	Best time to call?	E-mail address	
School District		County	
Estimated taxes pd (date & amt pd) Federal		Local Municipality	
Estimated taxes pd (date & amt pd) State			

## DEPENDENTS

Name	Social Security Number	Birth Date	Relationship
1)			
2)			
3)			
4)			

Some Sources of Income (please enclose documentation):

<ul style="list-style-type: none"> <li>• <b>If applicable, Form 1095A. Go to <a href="http://www.healthcare.gov">www.healthcare.gov</a> for your form.</b></li> <li>• Wages (W-2 Forms) and Unreported Tip Income</li> <li>• YTD payroll stub from all employers dated 2023</li> <li>• Social Security Income</li> <li>• Interest Income Forms (including tax-exempt interest)</li> <li>• Dividends Income (including tax-exempt dividends)</li> </ul> <p><b>Please include your 12/31/23 full year annual statements.</b></p> <ul style="list-style-type: none"> <li>• IRA, Pension, Annuity Distributions, and IRA Rollover Information</li> <li>• Unemployment Income – 1099G</li> <li>• Alimony Income old law</li> </ul>	<ul style="list-style-type: none"> <li>• 401K Statements</li> <li>• Gambling/Lottery/Prize Winnings</li> <li>• Jury Duty Pay</li> <li>• Hobby Income</li> <li>• Partnership &amp; S Corporation Income (Form K-1)</li> <li>• Estate Income (Form K-1)</li> <li>• Sale of Stocks (Form 1099B), real estate (Form 1099S), personal property or business property. <b>Purchase &amp; sale dates and amounts will be needed.</b></li> <li>• Business Income (identified by source, i.e., business income, loans, gifts, etc.)</li> <li>• Farm Income (identified by source, i.e., business income, loans, gifts, etc.)</li> <li>• Other Income not listed above</li> </ul>
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Child Care Expenses				IRA & RETIREMENT ACCOUNTS	
Provider's Name	Address	ID# of Provider(s)	Amount Paid	<b>PAYMENTS TO A TRADITIONAL IRA</b>	
				Taxpayer name: Date ____-____-____ Amount \$	
				Taxpayer name: Date ____-____-____ Amount \$	
Name of Institution	Tuition paid	Who Attended	When classes began	<b>PAYMENTS TO A ROTH IRA</b>	
				Taxpayer name: Date ____-____-____ Amount \$	
				Taxpayer name: Date ____-____-____ Amount \$	
				KEOGH, SEP & SIMPLE CONTRIBUTIONS _____	

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**PARTIAL LIST OF POSSIBLE DEDUCTIONS OR CREDITS**

<p>Medical savings account contributions</p> <p>Health Insurance &amp; Medicare premiums</p> <p>Prescriptions</p> <p>Eyeglasses, Hearing Aids &amp; batteries</p> <p>Doctor, Dentist &amp; Hospital bills</p> <p>Medical Miles traveled</p> <p>Medical travel &amp; lodging expenses</p> <p>Other medical expenses</p> <p>Real estate tax</p> <p>Personal property tax</p> <p>City/County tax</p> <p>Home mortgage – interest paid to financial institutions</p> <p>Home mortgage – interest paid to individuals (Include Name, address and SS# of individuals)</p> <p>Home Equity Loan Interest</p> <p>Mortgage Interest paid on other property. Explain</p> <p>Investment Interest Expense</p> <p>Qualified Student Loan Interest</p> <p>Church contributions</p> <p>Other cash contributions</p> <p>Charitable auto mileage</p> <p>Property donated for which you have receipts (fair market value)</p>	<p>Union dues</p> <p>Union name &amp; local #</p> <p>Professional Dues – work related</p> <p>Education required by Employer</p> <p>Tools, Supplies and Equipment used at your job</p> <p>Business miles for your employer’s purpose</p> <p>Work uniforms purchased and cleaning</p> <p>Gambling Losses</p> <p>Hobby Expenses</p> <p>Business Expenses (categorized)</p> <p>Farm Expenses (categorized)</p> <p>Qualified Adoption Expenses</p> <p>Auto: 12/31/23 Odometer                      12/31/22 Odometer</p> <p>Model, Make and Year of Car</p> <p>Business/Employer Miles</p> <p>Casualty Losses please call our office</p>
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Sale of Stock or other property	Date Bought	Date Sold	Cost	Sales Price

**RENTAL INCOME AND EXPENSE**

Total rent received

Expenses:

Taxes

Utilities

Insurance

Auto mileage

Repairs

Supplies

Other

**PAYMENTS TO EDUCATIONAL IRA’S and COLLEGE TUITION**

Child’s Name                      Amount