

INCOME TAX DATA-ITEMIZER

Taxpayer's name _____		Soc. Sec. No. _____	
Spouse's name _____		Soc. Sec. No. _____	
Taxpayer's occupation _____	Birthdate _____	Blind? _____	
Spouse's occupation _____	Birthdate _____	Blind? _____	
Address _____			
Phone _____			
Estimated taxes pd. Federal _____	State _____	Local _____	

DEPENDENTS

Name	Soc. Sec. No.	Birthdate	Relationship
1) _____	_____	_____	_____
2) _____	_____	_____	_____
3) _____	_____	_____	_____
4) _____	_____	_____	_____

Income	Support by you	Support by others	Months in your home
1) \$ _____	\$ _____	\$ _____	_____
2) \$ _____	\$ _____	\$ _____	_____
3) \$ _____	\$ _____	\$ _____	_____
4) \$ _____	\$ _____	\$ _____	_____

NOTE: You must provide a Social Security Number for all dependents.

THINGS TO BRING

___ W-2s	___ 1099-INTs	___ 1099-DIV	___ Other 1099s
___ K-1s	___ Tax forms with labels	___ Property tax bill	___ Last year's tax return *

* *NEW CLIENTS ONLY*

INTEREST INCOME (if not on 1099-INT)			DIVIDEND INCOME (if not on 1099-DIV)		
H/W/Jt	Payer	\$	H/W/Jt	Payer	\$

RENTAL INCOME AND EXPENSE

OTHER INCOME

<table style="width: 100%;"> <tr><td>Total rent received</td><td>_____</td></tr> <tr><td>Expenses – Taxes</td><td>_____</td></tr> <tr><td> Utilities</td><td>_____</td></tr> <tr><td> Interest</td><td>_____</td></tr> <tr><td> Insurance</td><td>_____</td></tr> <tr><td> Auto mileage</td><td>_____</td></tr> <tr><td> Repairs</td><td>_____</td></tr> <tr><td> Supplies</td><td>_____</td></tr> <tr><td> Other _____</td><td>_____</td></tr> <tr><td> _____</td><td>_____</td></tr> <tr><td> _____</td><td>_____</td></tr> <tr><td> _____</td><td>_____</td></tr> </table>	Total rent received	_____	Expenses – Taxes	_____	Utilities	_____	Interest	_____	Insurance	_____	Auto mileage	_____	Repairs	_____	Supplies	_____	Other _____	_____	_____	_____	_____	_____	_____	_____	<p>If you have other income, please bring all figures and supporting data. Examples:</p> <table style="width: 100%;"> <tr><td>Tips</td><td>_____</td></tr> <tr><td>Child care</td><td>_____</td></tr> <tr><td>Pensions / annuities</td><td>_____</td></tr> <tr><td>Jury duty</td><td>_____</td></tr> <tr><td>Strike benefits</td><td>_____</td></tr> <tr><td>Unemployment (1099-G)</td><td>_____</td></tr> <tr><td>Alimony received</td><td>_____</td></tr> <tr><td>Prizes (1099-MISC)</td><td>_____</td></tr> <tr><td>Farming</td><td>_____</td></tr> <tr><td>Self-employment</td><td>_____</td></tr> <tr><td>Partnerships and S corporations</td><td>_____</td></tr> <tr><td>Estates & trusts</td><td>_____</td></tr> <tr><td>Social security benefits</td><td>_____</td></tr> <tr><td>Scholarships & fellowships</td><td>_____</td></tr> <tr><td>Tax refunds</td><td>_____</td></tr> <tr><td>Royalties</td><td>_____</td></tr> <tr><td>Nontaxable income</td><td>_____</td></tr> <tr><td>Gambling</td><td>_____</td></tr> <tr><td>Other _____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </table>	Tips	_____	Child care	_____	Pensions / annuities	_____	Jury duty	_____	Strike benefits	_____	Unemployment (1099-G)	_____	Alimony received	_____	Prizes (1099-MISC)	_____	Farming	_____	Self-employment	_____	Partnerships and S corporations	_____	Estates & trusts	_____	Social security benefits	_____	Scholarships & fellowships	_____	Tax refunds	_____	Royalties	_____	Nontaxable income	_____	Gambling	_____	Other _____	_____	_____	_____
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