

2021 TAX DEDUCTION WORKSHEET

Personal Returns

Income <i>(from wages, 1099, etc.)</i>	\$
Other Income <i>(lottery winnings, jury duty, etc.)</i>	\$
Cancellation of Debt	\$
Alimony <i>(not child support)</i> Received OR Paid	Received \$
	Paid \$
IRA Contributions	\$
Child Care <i>(need provider, address, FEID, amount paid)</i>	\$
Medical Expenses <i>(out of pocket expense)</i>	\$
Mortgage Insurance	\$

Medical Mileage <i>(round trip to doctors, dentists, etc.)</i>	\$
Vehicle Taxes <i>(including motorcycles, RVs, etc. DO NOT include state fees)</i>	\$
Real Estate Taxes	\$
Charitable Contributions <i>(must include receipts; please see donation valuation guide)</i>	
Job Related Expenses NOT Reimbursed by Employer	\$
Education Expenses <i>(tuition, books, fees, etc.)</i>	\$
Student Loan Interest	\$

Please see the following checklist for documents and information to bring with you to your tax appointment:

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| <ul style="list-style-type: none"> <input type="checkbox"/> Last year's tax return not prepared in our office (Federal, State & Local) <input type="checkbox"/> Social security cards for each person <input type="checkbox"/> Current driver's license for each adult <input type="checkbox"/> W-2s <input type="checkbox"/> 1099s for Interest and Dividends <input type="checkbox"/> 1099Bs or year end investment statements <input type="checkbox"/> Stock/bond transaction information if not included on year end 1099B <input type="checkbox"/> Information about any refunds from the State or Local government regarding overpayment of prior year taxes <input type="checkbox"/> Information regarding sale of any investment property or stock | <ul style="list-style-type: none"> <input type="checkbox"/> K1s received from any corporations, partnerships, etc. <input type="checkbox"/> Unemployment statement 1099G <input type="checkbox"/> Social security statement <input type="checkbox"/> IRA, pension or retirement distribution information (may be on a 1099R) <input type="checkbox"/> IRA rollover/conversion information <input type="checkbox"/> Student loan interest information (this may be on a 1098) <input type="checkbox"/> Education credit information <input type="checkbox"/> Child care information including name, address, phone, EIN and amounts paid <input type="checkbox"/> Settlement papers from buying/selling home |
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BUILD YOUR BUSINESS. GROW YOUR WEALTH.



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