

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 2024</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 12/31/24 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	
Medical savings account contributions Health Insurance & Medicare premiums Prescriptions Eyeglasses, Hearing Aids & batteries Doctor, Dentist & Hospital bills Medical Miles traveled Medical travel & lodging expenses Other medical expenses Real estate tax Personal property tax City/County tax Home mortgage – interest paid to financial institutions Home mortgage – interest paid to individuals (Include Name, address and SS# of individuals) Home Equity Loan Interest Mortgage Interest paid on other property. Explain Investment Interest Expense Qualified Student Loan Interest Church contributions Other cash contributions Charitable auto mileage Property donated for which you have receipts (fair market value)	Union dues Union name & local # Professional Dues – work related Education required by Employer Tools, Supplies and Equipment used at your job Business miles for your employer’s purpose Work uniforms purchased and cleaning Gambling Losses Hobby Expenses Business Expenses (categorized) Farm Expenses (categorized) Qualified Adoption Expenses Auto: 12/31/24 Odometer                      12/31/23 Odometer  Model, Make and Year of Car Business/Employer Miles  Casualty Losses please call our office

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