

Miscellaneous Information

Name:

SSN:

Yes	No	General Information
		1. Were there any changes to your filing status or number of dependents?
		2. Can you or your spouse be claimed as a dependent by someone else?
		3. Did you incur any childcare expenses?
		4. Did you receive any notices from the IRS or the State taxing agency? If yes, please attach.

Yes	No	Income Information
		1. Have you received all W-2's from all employers? Please bring W-2's to appointment
		2. Did you work out of town at any time during the year?
		3. Did you or your spouse receive any tips not reported to your (or your spouse's employer?
		4. Did you receive any state or local income tax refunds from prior years?
		5. Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
		6. Did you receive a Schedule K-1 from a Partnership, S Corporation, or Trust? If so, please bring to appointment.
		7. Did you or your spouse receive any social security benefits during the year? If so please bring the SS 1099 to appointment.

Yes	No	Other Information
		Did you make any gifts to any one person in tax year in excess of \$14,000? If so, are you splitting this gift with your spouse?

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To itemize deductions, bring receipts and documentation for these types of expenses:

Are you covered by Health Insurance?

Employer provided _____ Provide 1095-C if applicable.

Other _____ Please provide proof of Insurance,

Form 1095-A or Form 1095-B

Medical Insurance Expense

Medical/Dental/Vision expenses

Prescriptions, first aid

Mileage and lodging for seeking medical care (do not include meals)

State/local income taxes

Mortgage interest

Tax preparation fees

Gambling losses (up to amount of winnings)

Cash donations to charity (provide all receipts)

Real estate and personal property taxes paid

Unreimbursed employee/work-related expenses
(if self-employed, do not include items reported on Schedule C).

Fair market value of property donated to charity.

Purchase price of new goods donated or used in volunteer work.

Comments: