

YOU'RE INCOME TAX ORGANIZER & DEDUCTION FINDER

"We Save You Dollars!"

Your Name _____ Birth-date _____
 Spouse's Name _____ Birth-date _____
 Your Address _____
 City & Zip _____ Home Phone _____
 Work/ Cell Phone _____ Email _____

SPECIAL ATTENTION AREAS
 Check Items to Discuss with Willette

- IRS Problems and Concerns
- Business Income and Expenses
- Moving Expenses
- Out-of-Town Expenses
- Rental Income and Expenses
- Retirement Income
- _____

DEPENDENTS: Name Soc. Sec. No. Birth-date Relationship Income

THINGS TO BRING • Last Year's Returns New Clients only • W2's, 1098s, 1099s • Closing Statements •

INCOME

Alimony Received . . . _____
 Commissions _____
 Lottery, Prizes _____
 Partnerships _____
 Pensions, Annuities . . . _____
 Royalties _____
 Self-Employment . . . _____
 Social Security _____
 State Tax Refund _____
 Tips _____
 Trust and Estates _____
 Unemployment _____

INTEREST & DIV

CREDITS

Alimony Paid _____
 Early W/D Penalty. IRA
 (You / Spouse) _____
Production Credit. _____
 Education ESA . . . _____
 Adoption Expenses. _____
 Tuition Expenses. _____

CHILD CARE

Amount Paid _____
To whom:
 Name, Address, ID # _____

MEDICAL

Batteries, Crutches, Etc. _____
 Doctors, Dentists, Labs. _____
 Drug/Alcohol Treatment. . _____
 Glasses, Contacts, Exams. _____
 Guide Dog, Wheelchair. _____
 Health/Dental Insurance. _____
 Hearing Aids, Braces. _____
 Hospitals, Nursing Care. _____
 Weight Loss Program. _____
 Necessary Lodging . . . _____
 School for Disabled . . . _____
 Special Diets, Wigs _____
 Therapy, Acupuncture . . . _____
 Prescriptions, Insulin . . . _____
 Taxi, Ambulance _____
 Special Equipment _____
 Breast Pumps, Lactation
 aid _____
 Mileage for Medical Care. _____

MISCELLANEOUS

Educator Expenses. _____
 Energy Saving Purchases. _____
 Large Item Purchases. . . _____
 Licenses, Bad Loans . . . _____
 Looking for a New Job. . . _____
 Office In Home Yes. . . _____
 Parking Fees, Tolls _____
 Physical Exams _____
 Safe Deposit Box _____
 Safety Equipment _____
 Student Loan Interest . . . _____
 Supplies, Tools _____
 Tax Preparation _____
 Training, Seminars _____
 Travel to 2nd Job _____
 Uniforms and Care _____
 Union/Professional Dues. . _____

TAXES

State Income Tax _____
REAL ESTATE TAX. _____
 Tag Tax _____
 Fed Estimated Tax _____
 State Estimated Tax _____

INTEREST

Mortgage _____
 If paid to an individual
 Name _____
 Address _____
 2nd Mortgage _____
 Points Paid _____
 Mortgage Insurance
 Prem. _____
 Investment Interest Exp. _____

CONTRIBUTIONS

Cash, Check, Charge. . . _____
 . _____
 Property Given (FMV). _____
Charitable Works:
 Mileage or Cost _____
 Out-of-Town Expenses. _____
 Supplies - Uniforms _____

AUTO EXPENSES

Auto Club Dues _____
 Gas, Oil, Lube _____
 Insurance _____
 INTEREST _____
 Lease Payments _____
 Licenses, Fees _____
 Rentals _____
 Repairs _____
 Tires - Accessories _____
 Washing and Waxing _____