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Description automatically generated



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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| First Name: | Click or tap here to enter text. | Middle Initial: | (X) | Last Name: | | Click or tap here to enter text. | | Calendar Year: | | 20\_\_\_ |
| Do you have an Identity Protection Pin from the IRS: | | | | | Yes:  No: | | If yes, please inform your preparer verbally. | | | |
| This tax year, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency: | | | | | | | | | Yes  No | |
| Did you have health insurance from the Federal Marketplace (if yes you would have a 1095-A): | | | | | | | | | Yes  No | |

**TAX DEDUCTIONS** [list the amounts where applicable]

*NOTE: Your total must exceed your standard deduction to affect the return. Also, there is an additional cost for itemizing your tax return.*

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | Did you have any cash gifts to charities (if yes, enter dollar amount): | Yes  No | $(enter here) |
| 2. | Did you have any property gifts to charities (if yes, enter dollar value): | Yes  No | $(enter here) |
| 3. | Did you have any vehicle mileage going to the charities (if yes, enter miles): | Yes  No | (enter here) mi |
| 4. | Did you pay out-of-pocket for any medical or dental care (if yes, enter amount): | Yes  No | $(enter here) |
| 5. | Did you have any sever loss due to fire, theft, or flood (if yes enter amount): | Yes  No | $(enter here) |
| 6. | Do you have any investment accounts (provide 1099 or earnings statement): | Yes  No | ////////////// |
| 7. | Did you contribute to an IRA outside of a 401k (provide 1099): | Yes  No | ////////////// |
| 8. | Did you pay any Student Loan interest (1098-E): | Yes  No | ////////////// |
| 9. | Are you or your spouse a full-time teacher: | Yes  No | ////////////// |
| 9b. | If Yes, list the total amount of expenses you incurred supporting the profession: | ////////////// | $(enter here) |
| 10. | Did you receive a First Time Home Buyers credit in 2008: | Yes  No |  |
| 11. | If you own a home, but do not have a 1098 Mortgage Interest statement, please enter the amounts paid for: | | |
| 11a. | •Real estate / Property Tax | ////////////// | $(enter here) |
| 11b. | •Homeowners insurance | ////////////// | $(enter here) |
| 12. | Did you pay State or Local income tax last year (if you filed with DWC, please skip) | Yes  No | $(enter here) |
| 13. | Did you have employment under any of the following: | ////////////// |  |
|  | •Armed Forces Reservists | Yes  No |  |
|  | •Performing Arts | Yes  No |  |
|  | •State or Local Fee-Based Official | Yes  No |  |
|  | •An Impaired Employee | Yes  No |  |
| 14. | If you are active-duty military, did you move for your job: | Yes  No | $(enter here) |
| 15. | Did you pay alimony (if yes, list the total amount for the tax year): | Yes  No | $(enter here) |

**TAX CREDITS** [please list the amount if applicable] *Note: Tax Credits can lower your tax liability and/or increase your tax refund*.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. | Did you pay any Higher Education expense (Form 1098-T): | | Yes  No | ////////////// |
| 1b. | If yes, enter the years in school and any additional cost incurred last year: | | (years) | $(enter here) |
| 2. | Did you make any energy efficient home improvements. If you did, list the item that was improved and the cost you incurred: | | (item) | $(cost) |
| (item) | $(cost) |
| 3. | Did you adopt a child: | | Yes  No | ////////////// |
| 4. | Did you pay for any childcare of your dependent:  (If yes, separately you will provide the caretaker’s Name, Address, & Tax ID) | | Yes  No | ////////////// |
| 5. | Did you contribute to an HSA or MSA separate from your employer: | | Yes  No | ////////////// |
| 6. | If you bought an Electric Vehicle list year, make, model, and cost. | (Year/Make/Model) | | $(cost) |