

DEDUCTIONS and CREDITS

Mortgage interest paid
Real estate taxes paid:
Vehicle license fee (DMV): (license. fee only, not total registration fee!)
Medical and dental expenses:
Total donations by cash or check:
Donations other than by cash or check:
Estimated Taxes paid (if any)
Student loan interest:
Traditional IRA contribution
ROTH IRA contribution
Tuition and education expenses: (must have received Form 1098-T) Tuition: Books/Supplies:
Daycare paid for dependent child:
Out-of-pocket health insurance premium (not employer coverage!)

NOTES:

INCOME

Please remember to send (fax or email) us all income-related tax forms you have received.

The most common income-related tax forms:

W-2	Employment	1099-DIV	Dividend earned
1099-INT	Interest earned	1099-B	Sold stocks, bonds
1099-R	Withdrawal from pension plan or retirement plan, IRA	1099-G	Unemployment, disability, State tax refund from previous year
1099-MISC	Self-employed, independent contractor, income from rent, royalty, etc	K-1	Partnership, Trust, Estate income or dividend from corporation