

INCOME: (OTHER THAN WAGES ON FORM W-2)

INTEREST INCOME	YES	NO
DIVIDEND INCOME	YES	NO
ALIMONY (RECEIVED)	YES	NO
CAPITAL GAINS FROM SALE(S) OF ASSETS (VEHICLES, BOATS, ETC.)	YES	NO
DISTRIBUTION FROM A RETIREMENT ACCT.	YES	NO
SOCIAL SECURITY BENEFITS	YES	NO
UNEMPLOYMENT	YES	NO
RENTAL PROPERTY INCOME	YES	NO
GAMBLING WINNINGS (includes lottery winnings)	YES	NO
CANCELLATION OF DEBTS Credit Card Settlements, ETC.	YES	NO

DEDUCTIONS/CREDITS

Were you a STUDENT (College or Vocational)	YES	NO
If Yes, How much was paid in Qualified expenses: Tuition _____ Books _____ We NEED Form 1098-T or proof of payment.		
ALIMONY (PAID) NEED SSN of person paid _____	YES	NO
STUDENT LOAN REPAYMENT (how much interest paid?)	YES	NO
IRA DEDUCTION May also qualify for RETIREMENT SAVINGS CONTRIBUTION CREDIT	YES	NO
EDUCATOR EXPENSES (for teachers only)	YES	NO
ANY ENERGY EFFICIENT UPGRADES? Previous credit?	YES	NO

FOR ITEMIZED DEDUCTIONS SEE SCHEDULE A

- MEDICAL & DENTAL EXPENSES (INCLUDING MILEAGE) Must be over 7.5% of AGI
- PROPERTY TAXES
- VEHICLE REGISTRATION (BOATS, ETC ALSO)
- MORTGAGE INTEREST AND/OR POINTS
- DONATIONS (CASH AND/OR NON-CASH)
- CASUALTY OR THEFT LOSSES
- WORK RELATED EXPENSES (NOT SUITS OR REGULAR CLOTHING)
- TAX PREPARATION FEES
- GAMBLING LOSSES (**ONLY UP TO AMOUNT OF GAMBLING WINNINGS**)

IF ANY REFUND OR PAYMENT DUE, DO YOU WANT DIRECT DEPOSIT OR DIRECT DEBIT???
WE NEED A VOIDED CHECK OR ROUTING NUMBER AND ACCOUNT NUMBER

RTN _____

ACCT NO. _____