

2011 Tax Worksheet

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Official Forms to bring or send:

W2's

1099's

1098's

Mortgage Interest Statements w/Property Tax info.

Tuition Statements & Educational Expenses

Student Loan Interest Statements

1099-B Stock Sales Forms & initial purchase information

HUD-1 Settlement Sheets from Home Sale, Purchase or Refinance

New Dependent Information: Date of Birth, Name on Social Security Card and SS#

New Clients - 2010 Tax Return & dependent birthdays

Account for all Income:

Employee Income

Self-Employed Income

Business & Partnership Income

Unemployment Income

Interest Income

Dividend Income

Rental Income

Stock Sale Income

Estate Income

Debt Forgiveness Income

Home Sale Income

Gambling Income

Farming Income

Royalty Income

Energy Credits:

Solar Energy purchases, Storm Windows/Doors, Insulation and High-Efficiency A/C Units

Description of Product: _____

Date of purchase: _____

Amount Paid: \$ _____

Sales Tax Paid: \$ _____

Childcare Expenses:

Name, Address and E.I.N. or SS# for each business or individual you paid for childcare.

Total paid to each business or organization.

Total paid for each child for the year.

Moving Expenses: (Moved over 50 miles and changed jobs in 2010)

Moving costs covered by employer? \$ _____

Miles driven with own vehicle: _____

Airfare or other transportation costs: \$ _____

Transport (Moving Truck): \$ _____

Fuel for Transport: \$ _____

Movers: _____

Number of days on the road moving:

Short Sale/Foreclosure Information:

1099-C and/or 1099-A from all loans on property

Final Settlement Sheets from Original Purchase

Equity Loans involved? What was purchased with the loan/s?

Arizona Residents:

Please list major purchases for use in AZ where no sales tax was paid (Internet especially).

Schedule A Expenses:

2011 Standard Deductions = \$5,800 Individuals
\$11,600 Married
\$8,500 Head of Household

Receipts required for your records

Health Expenses:

Prescriptions: \$ _____
Health Insurance paid out of pocket: \$ _____ (not out of paycheck)
Doctor, Dentist and Eye Doctors: \$ _____
Hospitals & Clinics: \$ _____
Miles traveled for health care: _____ miles
Other/explain: \$ _____ for _____
\$ _____ for _____

Property Tax: \$ _____

Vehicle Registration: \$ _____ Make/model: _____
\$ _____ Make/model: _____

New Vehicle Purchase:

Purchase Price: \$ _____ (plus) Sales Tax Paid: \$ _____
Make and Model: _____

Home Mortgage Interest: \$ _____ Mortgage Company: _____
\$ _____ Mortgage Company: _____

Cash Donations: \$ _____ to _____ (organization)
\$ _____ to _____
\$ _____ to _____

Items Donated worth: \$ _____ to _____
\$ _____ to _____
\$ _____ to _____

Non-reimbursed Work Expenses: (like union dues, required uniforms and purchases)

Out of pocket: \$ _____ for _____
 \$ _____ for _____
 \$ _____ for _____
 \$ _____ for _____

City, State and # of Days working there for a temporary assignment:

Miles Traveled for work reasons (not including commute): _____

Job Searches: \$ _____ for _____
 \$ _____ for _____

Miles Traveled for Job Searches: _____