

OTHER INCOME - Include 1099 and K-1 Forms Received

Tips and Gratuities	Payer	Amount
Commissions and Fees		
Prizes and Awards		
Alimony Received (pre-2019 agreements)		
Annuity and Pension Distributions		
Coverdell ESA Distributions		
IRA Distributions (regular, ROTH, SEP and SIMPLE)		
Were distributions used for K-12 or college educational expenses (at public or private school) of you, spouse, child, or grandchild? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, enter amount		
Were distributions used for first-time home buyer expenses of you, your spouse, child, or grandchild? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, enter amount		
Royalties		
Partnership, Joint Venture, L.L.C. or S corporation		
Index or Mutual Funds		
Household employee income (not reported on Form W-2)		
Hobby Income		
Trusts or Estates		

Tax Refunds (State and Local)	Payer	Amount
Unemployment Compensation		
Disability (may qualify for exclusion)		
Social Security received		
Lump sum distribution from Retirement/PS plans		
Jury Duty Fees		
Gambling Winnings		
Mortgage Debt Forgiveness		
Scholarship and Fellowship Grants		
Employer provided education assistance > \$5,250		
If Degree candidate: enter amount spent on tuition & course related equipment		
Conversion of IRA, SEP or SIMPLE to Roth IRA		
Other income (U.S. or Foreign?)		
Other:		
Other:		

STOCK OR PROPERTY SALES - Enclose Broker's statements, Form 1099-B, and Real Estate transaction papers

Description of Stock, Index/Mutual Fund, or Property (# of Shares)	Date Acquired	Date Sold	Sales Price Amount	Cost Basis Amount	Expenses of Sale	Basis Code*	Adjustments to Basis	Depreciation or Amortization

Yes No Discuss other exemptions for principal residence with tax preparer.
 Yes No depreciation claimed on this property for business or rental use?
 Yes No (if yes, please explain.)
 Yes No any of these sales using the installment method?

*Use Basis Codes below:
 A 1099-B Received; Box 3 basis (cost)
 C No 1099-B Received; basis is my cost
 B 1099-B Received; No Box 3 basis (cost)

Date
 Cost
 Is mor
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 Mortga
 Interest
 Amount c
 Other
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 Was loan taken o
 Other

EDITS - CHILD & DEPENDENT CARE/CHILD TAX CREDIT

Name of Qualifying Person	Date of Birth	Dependent?	Year End Age and Relationship	Months Lived in Home	Citizen of U.S. or Resident Alien	Incapable of Self-care

Organizations who cared for the children or dependents

Name and Address	Social Security No. or EIN	Amount Paid

DEDUCTIO

Alimony Paid (p
 Recipient
 Social Securi
 Penalty on early
 Casualty or theft
 (Only in federal
 Contribution to Hea
 Teachers - books, s
 Gambling Losses (u
 Gulf, Renewable Ener
 Other (specify)

EDUCATION CREDITS - Include 1099-Q Forms Recvd.

Name of Student	Enrolled in Post-Secondary Educational Institution?	Enrolled in Degree or Certificate Program?	Years of Post-Secondary Education Completed as of 12-31	Took at Least Half Normal Full-Time Workload During One Academic Period of Tax Year?	Ever Convicted of a Felony for Controlled Substances?	Amount of Tuition and Fees Paid During Tax Year (other than amounts paid for educational deduction)

BAND W-WIFE J-JOINT

STANDARD MILEAGE

Total miles driven this year	
Business miles driven	
Personal miles driven	
Was another vehicle available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have adequate insurance?	<input type="checkbox"/> Yes <input type="checkbox"/> No