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Other Income	Prior Year Amount	Current Year Taxpayer	Current Year Spouse
Taxable refunds of state and local income taxes			
Alimony received			
Business income or (loss) – Schedule C			
Other gains or (losses) – Form 4797			
Total IRA distributions			
Total pensions and annuities			
Rents and Royalties, S Corps, partnership – Schedule E			
Farm income or (loss) – Schedule F			
Unemployment compensation			
Total social security benefits			
All other income – not provided for above			
Tips			
Child care taxable benefits			
Prizes (1099-Misc)			
Scholarship and fellowships			

Adjustments to Income	Prior Year Amount	Current Year Amount
Your IRA deduction		
Spouse's IRA deduction		
Moving Expenses		
Self-employed SEP, SIMPLE, and qualified plans		
Penalty on early withdrawal of savings		
Alimony paid		

Child or Dependent Care Expenses – Paid to:

Name	Address	Social Security or ID Number	Amount Paid

Estimated Taxes and Other Taxes Paid

		Federal		State	
	Due Date	Date Paid	Amount	Date Paid	Amount
Applied From Prior Year's Refund					
First Quarter Estimated Tax	April				
Second Quarter Estimated Tax	June				
Third Quarter Estimated Tax	Sept				
Fourth Quarter Estimated Tax	This Jan				
Other Tax Payments					

Vehicle Information and Expenses	Vehicle One	Vehicle Two
Description of vehicle		
Is the vehicle used in a business or by an employee?		
Cost (including Sales Tax)		
Date placed in service		
Business Miles		
Commuting miles (daily commuting miles times the number of trips to work)		
Other personal use miles		
Total miles driven		
Gas and oil expenses		
Repairs and maintenance		
Auto insurance		
Registration, Licenses, and Fees		
Other auto expenses (identify)		
Auto rentals		

Auto Mileage Documentation	Yes	No
Is another car available for personal use?		
Do you have evidence to support your mileage information report above?		
If "Yes", is the evidence written in a log or other place?		

Self Employed Business Income and Expenses

Name of Business (A)				
Address of Business (A)				
Name of Business (B)				
Address of Business (B)				
	Business A		Business B	
	Prior Year	Current Year	Prior Year	Current Year
Gross Receipts or sales				
Returns and allowances				
Inventory at beginning of year				
Cost of merchandise purchased				
Cost of labor				
Materials and supplies				
Other costs				
Inventory at end of year				
Advertising				
Bad debts from sales or services				
Car and truck expenses				
Commissions and fees				
Depletion				
Depreciation				
Employee benefit programs				
Insurance (not health)				
Mortgage interest				
Other interest				
Legal and professional services				
Office expense				
Pension and profit-sharing plans				
Rent or lease: machinery/equipment				
Rent or lease: other business property				
Repairs and maintenance				
Supplies				
Taxes and licenses				
Travel				
Meals and entertainment				
Utilities				
Wages				
Other:				

General Questions

Please check if "Yes" and provide documentation if possible.

	Did your marital status change?
	Were you notified by the IRS of changes to a prior year's return?
	Are you being claimed as a dependent by another person?
	Were there any changes in dependent information from the prior year?
	Did you have any children under the age of 14 who received more than \$1,500 in investment income?
	Do you have dependents who are neither U.S. Citizens nor U.S. Residents?
	Did you provide over half of the support for another person (or persons) during the year?
	Did you sell or purchase a principal residence?
	Did you receive payments from a pension or profit sharing plan?
	Did you receive any distributions from an IRA or other qualified plan?
	Did you receive any disability income?
	Did you receive any foreign income or pay any foreign taxes?
	Did you receive interest from a bank account or other financial account based in a foreign country?
	Were you the grantor of or transferor to a foreign trust?
	Did you pay nondeductible dues to an association that was involved in political lobbying?
	If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?
	Did you incur any non-business bad debts?
	Did you receive proceeds from an installment sale made to relatives?
	Did you make a loan at an interest rate below market rate?
	Did you make gifts of over \$10,000 to an individual?
	Were there any changes to a prior year's income, deductions, or credits that would require filing an amended return?
	Did your employer pay premiums on life insurance in excess of \$50,000?

Business and Investment Questions

Please check if "Yes" and provide documentation if possible.

	Did you receive stock from a stock bonus plan with your employer?
	Did you buy or sell any bonds?
	Did you surrender any U.S. Savings bonds
	Did you suffer a casualty, theft or condemnation?
	Did you start a business, purchase rental property or farm, or acquire interests in partnerships or S-Corporations?
	Did you own any investments for which you were not personally "at-risk"?
	Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?
	Did you sell any property or equipment on installment?
	Did you incur any business-related educational expenses?
	Did you incur any travel and entertainment expenses?
	Did you purchase any specials fuels for non-highway use?
	Did you own a diesel-powered vehicle?