

Tell us about last year . . . (check all that apply)

Did you live in any other state? Work in any other states? Was the move job related?

If yes please list states and the dates you lived:

Dates	City	State	School Dist.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Moving Expenses:

Income:

Received wages, salaries or any other employer compensation?

Received **W-2** forms from ALL employers you worked for last year?

Received unemployment compensation (1099-G)? Which State:

Received a state tax refund How Much:

Received Alimony?

Received Social Security Income (1099-SA)?

Received pension, annuity, ROTH, IRA or retirement Income (1099-R)?

Take a distribution from any retirement account? How Much:

Received Royalties

Received any Gambling Winnings (W2-G)? How Much:

Received 1099-Misc. Income (prizes, awards, jury duty)?

Own your own business or work as self employed?

(If Self Employed or own your own business please refer to our LLC, C-Corp and S-Corp Organizers)

Business Name	Proprietor Name	Date of Business Start?		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use a portion of your home exclusively for business? (please see pg. 4 "Office-In-Home")

Investments:

Received interest on savings, cash, US bonds, stock dividends?

Sell stock, mutual fund or other securities? (please have cost basis available)

Received income on a partnership, S-Corp, Estate or Trust (K1)?

Contribute to a:

ROTH IRA \$ _____ Traditional IRA \$ _____

SEP \$ _____ Keogh \$ _____

Simple Retirement Plan \$ _____

Do you have a Health Savings Account (HSA)?

Was the Earned Income Credit Ever Disallowed for you?

Sell your home? Sell any other property (equipment, land, etc.)?

(Please have bought date/price and sold date/price available?)

Rental Property:

Property Description:

[Empty text box for Property Description]

Physical Address:

City

State

Zip

[Empty text boxes for Physical Address, City, State, Zip]

Type of Property:

- Single Family Residence Multi-Family Residence Vacation / Short Term
- Commercial Land Royalties Self Rental Other(describe): _____

RENTAL INCOME:

[Empty text box for Rental Income]

RENTAL EXPENSES			
	Amount		Amount
Advertising	[]	Qualified Mtg Insurance	[]
Auto (Force)	[]	Other Interest	[]
Travel	[]	Repairs	[]
Cleaning & Maintenance	[]	Supplies	[]
Commissions	[]	Real Estate Tax	[]
Insurance	[]	Utilities / Gas	[]
Legal & Professional	[]	Electric	[]
Management Fees	[]	Association Fees	[]
Mortgage Interest	[]	Other	[]
Other Mortgage Interest	[]	Refinancing Points Paid	[]

Education:

Tuition for Higher Education(as seen on 1098-T form):

Student's Name: [] Degree: []

Institution: [] Federal Tax ID#: []

1. Payments Received: [] 2. Amounts Billed: []

3. If box is checked, your education institution has changed its reporting method:

4. Adjustments made for prior year: [] 5. Scholarships and Grants: []

6. Adjustments made to scholarships or grants for a prior year: []

7. Check if amount in box 1&2 includes period Jan.- Mar. 2014:

8. Check if at least half-time student 9. Check if graduate student 10. Insurance:

Student Loan Interest Paid: []

ITEMIZED DEDUCTIONS

MEDICAL EXPENSES (Must Exceed 7.5%)		CHARITABLE CONTRIBUTIONS	
Medical / Dental insurance premiums		Church	
Medical Ins. premiums (w/held from SS)		Payroll Deduction	
Prescription drugs (no over the counter)		Cancer Benefit	
Doctor / Dentist		Salvation Army	
Hospitals / Nursing home/ Nursing Care		Scouts	
Psychotherapy, psychology counseling		Car Donation	
Glasses, hearing aids, batteries		Other	
Auto travel & parking (medical purposes)		Other	
Insurance reimbursement (only for amounts listed above)		Other	
TAXES PAID		MISCELLANEOUS DEDUCTIONS	
Real Estate – Home & Other Property		Attorney Fees	
State Income Tax Paid		Business Gifts	
Balance due on last year's return		Dues (Union and professional)	
Prior year's 4 th qrt. Est. paid Jan.		Employment related education	
Personal Property Tax		Business Insurance	
		Investment expenses	
HOME MORTGAGE INTEREST PAID		Job Seeking expenses	
Primary Residence – 1 st Mortgage		Licenses, fees, etc.	
Primary Residence – 2 nd Mortgage		Safe deposit box	
Secondary Residence – 1 st Mortgage		Tax prep fees	
Secondary Residence – 2 nd Mortgage		Uniforms	
MORT INTEREST TO AN INDIVISUAL:		Professional books	
Name:		Other:	
Address:			
Amount:			
CHILD CARE EXPENSES		OFFICE-IN-HOME	
Name:		Square footage of home	
SS# or EIN		Total square footage of home	
Address:		Utilities	
Amount:		Repairs	
Name:		Insurance	
SS# or EIN		Other:	
Address:			
Amount:			