

# INCOME TAX DATA-ITEMIZER

Taxpayer's name _____		Soc. Sec. No. _____	
Spouse's name _____		Soc. Sec. No. _____	
Taxpayer's occupation _____	Birthdate _____	Blind? _____	
Spouse's occupation _____	Birthdate _____	Blind? _____	
Address _____			
Phone _____			
Estimated taxes pd.	Federal _____	State _____	Local _____

## DEPENDENTS

Name	Soc. Sec. No.	Birthdate	Relationship
1) _____	_____	_____	_____
2) _____	_____	_____	_____
3) _____	_____	_____	_____
4) _____	_____	_____	_____
<i>Income</i>	<i>Support by you</i>	<i>Support by others</i>	<i>Months in your home</i>
1) \$ _____	\$ _____	\$ _____	_____
2) \$ _____	\$ _____	\$ _____	_____
3) \$ _____	\$ _____	\$ _____	_____
4) \$ _____	\$ _____	\$ _____	_____

NOTE: You must provide a Social Security Number for all dependents.

## THINGS TO BRING

- |           |                      |                        |                             |
|-----------|----------------------|------------------------|-----------------------------|
| ____ W-2s | ____ 1099-INTs       | ____ 1099-DIV          | ____ Other 1099s & 1098s    |
| ____ K-1s | ____ <b>Photo ID</b> | ____ Property tax bill | ____ Last year's tax return |

INTEREST INCOME (if not on 1099-INT)			DIVIDEND INCOME (if not on 1099-DIV)		
H/W/Jt	Payer	\$	H/W/Jt	Payer	\$

## RENTAL INCOME AND EXPENSE

## OTHER INCOME

<table style="width: 100%; border: none;"> <tr><td>Total rent received</td><td>_____</td></tr> <tr><td>Expenses – Taxes</td><td>_____</td></tr> <tr><td>    Utilities</td><td>_____</td></tr> <tr><td>    Interest</td><td>_____</td></tr> <tr><td>    Insurance</td><td>_____</td></tr> <tr><td>    Auto mileage</td><td>_____</td></tr> <tr><td>    Repairs</td><td>_____</td></tr> <tr><td>    Supplies</td><td>_____</td></tr> <tr><td>    Other _____</td><td>_____</td></tr> <tr><td>    _____</td><td>_____</td></tr> <tr><td>    _____</td><td>_____</td></tr> <tr><td>    _____</td><td>_____</td></tr> </table>	Total rent received	_____	Expenses – Taxes	_____	Utilities	_____	Interest	_____	Insurance	_____	Auto mileage	_____	Repairs	_____	Supplies	_____	Other _____	_____	_____	_____	_____	_____	_____	_____	<p>If you have other income, please bring all figures and supporting data. Examples:</p> <table style="width: 100%; border: none;"> <tr><td>Tips</td><td>_____</td></tr> <tr><td>Child care</td><td>_____</td></tr> <tr><td>Pensions / annuities</td><td>_____</td></tr> <tr><td>Jury duty</td><td>_____</td></tr> <tr><td>Strike benefits</td><td>_____</td></tr> <tr><td>Unemployment (1099-G)</td><td>_____</td></tr> <tr><td>Alimony received</td><td>_____</td></tr> <tr><td>Prizes (1099-MISC)</td><td>_____</td></tr> <tr><td>Farming</td><td>_____</td></tr> <tr><td>Self-employment</td><td>_____</td></tr> <tr><td>Partnerships and S corporations</td><td>_____</td></tr> <tr><td>Estates &amp; trusts</td><td>_____</td></tr> <tr><td>Social security benefits</td><td>_____</td></tr> <tr><td>Scholarships &amp; fellowships</td><td>_____</td></tr> <tr><td>Tax refunds</td><td>_____</td></tr> <tr><td>Royalties</td><td>_____</td></tr> <tr><td>Nontaxable income</td><td>_____</td></tr> <tr><td>Gambling</td><td>_____</td></tr> <tr><td>Other _____</td><td>_____</td></tr> <tr><td>    _____</td><td>_____</td></tr> </table>	Tips	_____	Child care	_____	Pensions / annuities	_____	Jury duty	_____	Strike benefits	_____	Unemployment (1099-G)	_____	Alimony received	_____	Prizes (1099-MISC)	_____	Farming	_____	Self-employment	_____	Partnerships and S corporations	_____	Estates & trusts	_____	Social security benefits	_____	Scholarships & fellowships	_____	Tax refunds	_____	Royalties	_____	Nontaxable income	_____	Gambling	_____	Other _____	_____	_____	_____
Total rent received	_____																																																																
Expenses – Taxes	_____																																																																
Utilities	_____																																																																
Interest	_____																																																																
Insurance	_____																																																																
Auto mileage	_____																																																																
Repairs	_____																																																																
Supplies	_____																																																																
Other _____	_____																																																																
_____	_____																																																																
_____	_____																																																																
_____	_____																																																																
Tips	_____																																																																
Child care	_____																																																																
Pensions / annuities	_____																																																																
Jury duty	_____																																																																
Strike benefits	_____																																																																
Unemployment (1099-G)	_____																																																																
Alimony received	_____																																																																
Prizes (1099-MISC)	_____																																																																
Farming	_____																																																																
Self-employment	_____																																																																
Partnerships and S corporations	_____																																																																
Estates & trusts	_____																																																																
Social security benefits	_____																																																																
Scholarships & fellowships	_____																																																																
Tax refunds	_____																																																																
Royalties	_____																																																																
Nontaxable income	_____																																																																
Gambling	_____																																																																
Other _____	_____																																																																
_____	_____																																																																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">SALE OF STOCK OR OTHER PROPERTY</th> <th style="width: 20%;">Cost</th> <th style="width: 20%;">Sales Price</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>	SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price																																																														
SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price																																																															
Please bring supporting documents																																																																	

