

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)			

Income	Support by you	Support by others	Months in your home
1) \$	\$	\$	
2) \$	\$	\$	
3) \$	\$	\$	
4) \$	\$	\$	

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

THINGS TO BRING

- | | | | |
|-------------------------------|--|--|---|
| <input type="checkbox"/> W-2s | <input type="checkbox"/> 1099-INTs | <input type="checkbox"/> 1099-DIV | <input type="checkbox"/> Other 1099s |
| <input type="checkbox"/> K-1s | <input type="checkbox"/> Tax forms with labels | <input type="checkbox"/> Property tax bill | <input type="checkbox"/> 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 & trusts</td><td>_____</td></tr> <tr><td>Social security benefits</td><td>_____</td></tr> <tr><td>Scholarships & 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>Other</td><td>_____</td></tr> <tr><td>_____</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	_____	Other	_____	_____	_____	_____	_____
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