TAX DATA - 2016

NAME		SPOUSE NAME			
OccupationBirth Date		OccupationBirth Date			
Cell #	Telephone (work)	(home)			
FULL NAME		BIRTHDATE			
INCOME (enclose all W-2s, WAGES (# of W-2s)	1099s, & K-1s)	UNEMPLOYMENTSOCIAL SECURITY			
BOND INTEREST: U.S STATE		IRA/ KEOGH/ SEP PENSION ALIMONY			
DIVIDENDS STATE TAX REFUND PROPERTY TAX REFUND		ALIMONI			
How many months did you have	e health insurance in 2	2016?			
DEDUCTIONS MEDICAL Prescription medicine		CONTRIBUTIONS Paid by check			
Drs, Hospitals, etc		Paid by cash (with receipt)Paid by cash (no receipts – no deduction) Travel - mileage (14¢)			
Parking & Auto miles (19¢)		Clothing, household goods, etc. (Receipts and detail required for all deductions)_			
		NITTED FOR			
TAXES		INTEREST Home Mortgage			
Real Estate		Mortgage interest - 2nd home			
Auto License (list individually) Sales tax paid (major purchase)		Home Equity Loan			
2016 State taxes paid in 2015	5)	Amount			
2016 State taxes paid in 2015_2016 Estimated tax payments (list in detail)	Name/SSN			
		Address			
MISCELLANEOUS		School interest paid			
		Mortgage points paid			
Tax Service (include mileage)		Investment interest paid			
Dependent school costs (list in					
Tuition/Supplies		Mortgage insurance premium paid			
Computer/Other					
College tuition paid					
(list by student)		Refinance (include closing papers)			
Investment expense					

Other____

Job related education: Tuition/Books Mileage Teaching Supplies Job Search Cost: Fees/resumes, etc Mileage BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Tries Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Education Telephone Office supplies Lodging (# of nights] \$ Residenting Car rental, taxis, etc.	RETIREMENT				
Roth IRA contribution Date paid Nondeductrible IRA cont Date paid Nondeductrible IRA cont Date converted CHILD CARE (including amount paid by employer) Name	Regular IRA contribution	Date paid			
Nondeductible IRA cont Roth conversion CHILD CARE (including amount paid by employer) Name Address Name Address Name Address Name Address Social security (ID#) of payee Amount paid Address Social security (ID#) of payee EMPLOYEE JOB RELATED EXPENSES / CREDITS MISCELLANEOUS Hob related education: Tution/Books Mileage Uniforms & Cleaning Union dues Teaching Supplies Hob Search Cost: Mileage Work tools Holeage Work tools Holeage Uniforms & Safety equipment Union dues Teaching Supplies Hob Feat of the property of the pro	Roth IRA contribution				
Roth conversion	Nondeductible IRA cont	Date paid			
CHILD CARE (including amount paid by employer) Name Address Name Address Name Address Social security (ID#) of payee Amount paid Address Social security (ID#) of payee Amount paid Address Social security (ID#) of payee Amount paid Address Social security (ID#) of payee EMPLOYEE JOB RELATED EXPENSES / CREDITS MISCELLANFOUS Job related education: Tuition/Books Mileage Uniforms & Cleaning Cleaning Uniforms & CREDIT YOU MAY QUALIFY FOR Poreign Tax Entertainment Child Care Retirement Uniforms & CREDIT YOU MAY QUALIFY FOR Poreign Tax Entertainment Child Tax Clodging (# of nights) \$ Residential Energy Promotion (gifts) Laundry & Cleaning Carrental, Laxis, etc.	Roth conversion	Date converted			
Name	CHILD CARE (including amount paid by employer)				
Address Social security (ID#) of payee Name Amount paid Social security (ID#) of payee S		Amount paid			
Name	Address	Social security (ID#) of payee			
Address Social security (ID#) of payee Amount paid Social security (ID#) of payee Social secu	Name				
Address Social security (ID#) of payee EMPLOYEE JOB RELATED EXPENSES / CREDITS MISCELLANEOUS Job related education: Tuition/Books Safety equipment Mileage Uniforms & Cleaning Union dues Teaching Supplies Work tools Job Search Cost: Mileage to and from 2nd job Safe deposit rental Other BUSINESS AUTO EXPENSE Lease payments Gas & oil Date purchased Washes Purchase price Tires Total '16 miles driven Insurance Bus. '16 miles driven Interest License / taxes Do you have another vehicle for personal use? Datriare EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Elderly/Disabled Louding (# of nights) \$ Residential Energy Perfonotion (gifts) Laundry & cleaning Lare retal, taxis, etc.	Address	Social security (ID#) of payee			
EMPLOYEE JOB RELATED EXPENSES / CREDITS MISCELLANEOUS Job related education: Tuition/Books Mileage Uniorms & Cleaning Uniorms & Cleaning Union dues Teaching Supplies Job Search Cost: Mileage to and from 2 nd job Seferseumes, etc Mileage Mileage Other BUSINESS AUTO EXPENSE Lease payments Gas & oil Date purchased Washes Tires Tires Tires Tires Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Entertainment Meals & tips Elderly/Disabled Louging (# of nights) Promotion (gifts) Landry & cleaning Landry & cleaning Car rental, 1 taxis, etc.	Name				
EMPLOYEE JOB RELATED EXPENSES / CREDITS MISCELLANEOUS Job related education: Tuition/Books Mileage Uniforms & Cleaning Unifo	Address	Social security (ID#) of payee			
Job related education: Tuition/Books Mileage Teaching Supplies Job Search Cost: Fees/resumes, etc Mileage BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Tries Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Education Telephone Office supplies Lodging (# of nights] \$ Residenting Car rental, taxis, etc.	EMPLOYEE JOE	B RELATED EXPENSES / CREDITS			
Tuition/Books Mileage Uniforms & Cleaning Union dues Teaching Supplies Work tools Job Search Cost: Mileage to and from 2 nd job Safe deposit rental Other BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Purchase price Tires Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Telephone Office supplies Lodging (# of nights \$ Person \$ P	<u>MISCELLANEOUS</u>				
Tuition/Books Mileage Uniforms & Cleaning Union dues Work tools Job Search Cost: Mileage to and from 2nd job Safe deposit rental Other BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Purchase price Total '16 miles driven Insurance Insurance License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Telephone Office supplies Laundry & cleaning Car rental, taxis, etc. Safe ty equipment Uniforms & Cleaning Union dues Work tools Mileage Vear & make of auto Date purchased Park make of auto Gas & oil Date purchased Do you have another vehicle for personal use? Do you have a mileage log? CREDIT YOU MAY QUALIFY FOR Foreign Tax Child Care Retirement Child Tax Residential Energy Elderly/Disabled Adoption Car rental, taxis, etc.	Job related education:	Other			
Mileage Uniforms & Cleaning Union dues Teaching Supplies Work tools Job Search Cost: Mileage to and from 2nd job Safe deposit rental Other BUSINESS AUTO EXPENSE Lease payments Year & make of auto Gas & oil Date purchased Washes Purchase price Total '16 miles driven Insurance Bus. '16 miles driven Interest License / taxes Do you have another vehicle for personal use? Do you have a mileage log? EMPLOYEE BUSINESS TRAVEL Airfare Do you have a mileage log? Employee Business Travel Entertainment Child Care Education Telephone Retirement Office supplies Lodging (# of nights) \$ Residential Energy Promotion (gifts) Laundry & cleaning Car rental, taxis, etc.	Tuition/Books	Safety equipment			
Teaching Supplies	Mileage	Uniforms & Cleaning			
Teaching Supplies Job Search Cost: Fees/resumes, etc Mileage Other BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Tires Total '16 miles driven Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Telephone Office supplies Lodging (# of nights Definition of the sign of the si		Union dues			
Mileage Safe deposit rental	Teaching Supplies	Work tools			
Fees/resumes, etc	Job Search Cost:	Mileage to and from 2 nd iob			
Mileage Other BUSINESS AUTO EXPENSE Lease payments Year & make of auto Date purchased Washes Purchase price Tires Total '16 miles driven Insurance Bus. '16 miles driven Interest Do you have another vehicle for personal use? Parking tolls Do you have a mileage log? EMPLOYEE BUSINESS TRAVEL CREDIT YOU MAY QUALIFY FOR Foreign Tax Entertainment Foreign Tax Entertainment Education Meals & tips Education Telephone Retirement Office supplies Child Tax Lodging (# of nights) \$ Residential Energy Promotion (gifts) Laundry & cleaning Car rental, taxis, etc.	Fees/resumes, etc	Safe deposit rental			
BUSINESS AUTO EXPENSE Lease payments Gas & oil Washes Purchase price Total '16 miles driven Bus. '16 miles driven Bus. '16 miles driven Bus. '16 miles driven Bus. '16 miles driven Bu	Mileage	Other			
Lease payments Year & make of auto Date purchased Washes Tires Total '16 miles driven Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Total '16 miles driven Do you have another vehicle for personal use? Do you have a mileage log? Child Care Education Telephone Office supplies Lodging (# of nights) \$ Promotion (gifts) Laundry & cleaning Car rental, taxis, etc.	-				
Gas & oil	BUSINESS AUTO EXPENSE				
Gas & oil	Lease payments	Year & make of auto			
Washes Tires Tires Insurance Insurance Interest License / taxes Parking tolls Repairs Other EMPLOYEE BUSINESS TRAVEL Airfare Entertainment Meals & tips Telephone Office supplies Lodging (# of nights) \$ Promotion (gifts) Laundry & cleaning Car rental, taxis, etc. Total '16 miles driven Bus. '16 miles driven Do you have another vehicle for personal use? Do you have a mileage log? CREDIT YOU MAY QUALIFY FOR Foreign Tax Child Care Education Retirement Child Tax Residential Energy Elderly/Disabled Adoption Adoption	Gas & oil	Date purchased			
Tires	Washes	Purchase price			
Insurance Bus. '16 miles driven Bus. '16 miles Bus. '16	Tires	Total '16 miles driven			
Interest	Insurance	Bus. '16 miles driven			
License / taxes Do you have another vehicle for personal use? Do you have a mileage log?	Interest				
Parking tolls	License / taxes	Do you have another vehicle for personal use?			
Repairs Other CREDIT YOU MAY QUALIFY FOR Foreign Tax Child Care Education Retirement Child Tax Residential Energy Promotion (gifts) Elderly/Disabled Adoption Car rental, taxis, etc.	Parking tolls	Do you have a mileage log?			
EMPLOYEE BUSINESS TRAVEL CREDIT YOU MAY QUALIFY FOR Airfare Foreign Tax Entertainment Child Care Meals & tips Education Telephone Retirement Office supplies Child Tax Lodging (# of nights) \$ Residential Energy Promotion (gifts) Elderly/Disabled Laundry & cleaning Adoption Car rental, taxis, etc. Adoption	•				
Airfare	Other				
Airfare	EMPLOYEE BUSINESS TRAVEL	CREDIT YOU MAY QUALIFY FOR			
Entertainment Child Care Meals & tips Education Telephone Retirement Office supplies Child Tax Lodging (# of nights) \$ Residential Energy Promotion (gifts) Elderly/Disabled Laundry & cleaning Adoption Car rental, taxis, etc. Adoption		Foreign Tax			
Meals & tips Education Telephone Retirement Office supplies Child Tax Lodging (# of nights Residential Energy Promotion (gifts) Elderly/Disabled Laundry & cleaning Adoption Car rental, taxis, etc. Adoption	Entertainment				
Telephone		Education			
Office supplies Child Tax Lodging (# of nights) \$ Residential Energy Promotion (gifts) Elderly/Disabled Laundry & cleaning Adoption Car rental, taxis, etc					
Promotion (gifts) Elderly/Disabled Adoption Car rental, taxis, etc.	Office supplies	Child Tax			
Promotion (gifts) Elderly/Disabled Laundry & cleaning Adoption Car rental, taxis, etc	Lodging (# of nights) \$	Residential Energy			
Laundry & cleaning Adoption Adoption					
Car rental, taxis, etc					
		1			
	Other_				

TAX DATA - 2016

If you would like your refund directly deposited to your bank account, please

BANKING INFORMATION

				account number accelled or voided of	•	•
Bank nameBank Routing # (nine digits)			Account type Savings Checking Joint Account # (ten digits)			
CAPITAL GAIN (L	OSS) SCHEDU	<u>JLE</u>				
Security	# of Shares	Date Bought	Date Sold	Sale (Net Proceeds)	Cost (amount paid)	Net Gain (loss)
INCOME TAXES P Federal Estimates Date Amount	AID 1st Q	tr 2nd Qt	r 3rd Q	tr 4th Qtr	Extension	l —
State Estimates Date Amount	1st Q	tr 2nd Qt	r 3rd Q	tr 4th Qtr	Extension	-

RECEIPTS, MEMOS, INVOICES, CANCELLED CHECKS & LOG BOOKS ARE REQUIRED BY THE IRS AS PROOF FOR DEDUCTIONS CLAIMED. ENCLOSE YOUR 2017 REAL ESTATE STATEMENT (STATE COPY) OR 2016 RENT CREDIT FORM IF YOU WOULD LIKE A REFUND FORM PREPARED.