TAXPAYER/SPOUSE: ______________________________
EMAIL: ______________________________
PHONE #: ______________________________
BIRTHDATE: ______________________________
ADDRESS: ______________________________

LIST ALL DEPENDENTS

First Name Last Name	Date of Birth	SS#	Relationship	Months lived in your Home	2020 College Student Y/N

CHILD AND DEPENDENT CARE EXPENSES

Provider Information:	Provider #1	Provider #2 (if any)
Name:		
Address:		
SS# or EIN#:		
Amount Paid in 2020:		

DIRECT DEPOSIT (IF YOU WOULD LIKE REFUND DIRECT DEPOSITED)

Bank Name: ______________________________ Routing Number: ______________________________

Account Number: ______________________________ Type of Account (Checking-Savings): ______________________________

ESTIMATED TAX PAYMENTS

	Federal		State #1		State #2	
	Date	Amount	Date	Amount	Date	Amount
1st (4/15/20)						
2nd (6/15/20)						
3rd (9/15/20)						
4th (1/15/21)						

1. **SALARY and WAGES:** Please provide all copies of Form W-2's
2. **PENSION, IRA, and ANNUITY DISTRIBUTIONS:** Please provide all copies of Form 1099-R's
3. **SCHEDULE K-1's:** Please provide all copies of Schedule K-1's
4. **GAMBLING INCOME:** Please provide all copies of Form W-2G's
5. **INTEREST INCOME:** Please provide all copies of Form 1099-1NT's
6. **PPP LOAN**
7. **EIDL LOAN**

SELLER FINANCED MORTGAGE INTEREST

Payer's Name: ______________________________ Payer's Address: ______________________________

Payer's SS#: ______________________________ Amount Received in 2020: ______________________________

DIVIDEND INCOME

Please provide all copies of Form 1099-DIV's

BUSINESS INCOME/RENTAL INCOME

Please provide all income and expenses

SALES OF STOCKS, SECURITIES AND OTHER INVESTMENT PROPERTY

Please provide all copies of Form 1099-B, 1099-S and HUD Settlement Statements (sales & purchases)

Please provide selling price, cost, date of purchase, date of sale on each transaction **OR** provide end of year realized Gains/Loss Statement from investment accounts.

OTHER INCOME

Please provide all copies of Form1099-NEC, 1099-Misc., etc.

State and Local Income Tax Refunds – please provide Form 1099-G's

	Taxpayer	**Spouse**
Alimony Received and Date of Divorce:	____________________	____________________
Unemployment Compensation:	____________________	____________________
Other:	____________________	____________________

ADJUSTMENTS TO INCOME – IRA CONTRIBUTIONS

Please provide year end statements for each account and any Form 8606

	Taxpayer	**Spouse**
2020 Traditional IRA Contribution:	____________________	____________________
2020 Roth IRA Contribution:	____________________	____________________

HIGHER EDUCATION DEDUCTIONS AND/OR CREDITS

Complete this section if you paid interest on a qualified student loan in 2020 for qualified higher education expenses for you, your spouse or a person who was your dependent when you took out the loan.

Qualified student loan interest paid to:	**2020 Amount paid**
____	______________
____	______________

Please provide all copies of Form 1098-T's

Student Name ____________________Qualified expenses ______________ Amount ________

JOB RELATED MOVING EXPENSES

Total expense if job related

OTHER ADJUSTMENTS TO INCOME

Alimony Paid and Date of Divorce:

Recipient Name ______________ Recipient SS# ______________ 2020 Amount paid ___________

Address ____

	Taxpayer	**Spouse**
Teacher out-of-pocket expenses:	____________________	____________________
Adoption expenses:	____________________	____________________
Energy Efficient Home Improvements (please Provide invoice)	____________________	____________________

MEDICAL AND DENTAL EXPENSES

	Taxpayer	Spouse	Dependent	Total
Medical and dental expenses:	______________	______________	______________	______________
Medical insurance premiums	______________	______________	______________	______________
Long-term care premiums	______________	______________	______________	______________
Prescription medicines and drugs	______________	______________	______________	______________
Miles driven for medical purposes	______________	______________	______________	______________

TAX EXPENSES

	2020 Amount paid
Real estate taxes paid – Primary residence	_____________________
Real estate taxes paid – Additional properties	_____________________
Personal property taxes	_____________________
2020 Rent paid (certain States allow deduction)	_____________________

INTEREST EXPENSES

2020 Amount paid

Home mortgage interest: Please provide Form 1098 _____________________

Other, such as Home mortgage interest paid to individuals

Name ___________________________________ **SSN** _____________________ **2020 Amount paid** _______________

Address ____

2020 Amount paid

Investment interest expense (Please provide 1099's) _____________________

Refinancing information (if applicable)	**Refinance #1**	**Refinance #2**
Description	____________________________	________________________________
Total Points Paid	____________________________	________________________________
Date of refinance	____________________________	________________________________
Total number of payments to be made	____________________________	________________________________

CHARITABLE CONTRIBUTIONS

Contributions made by cash or check ___________________ Volunteer miles driven __________________

Non-cash items, such as: Goodwill, Salvation Army __________________________

(Provide receipts if greater than $500 in total)

MIDSCELLANEOUS DEDUCTIONS

	Taxpayer	Spouse
Unreimbursed business expenses (please break out)	_______________________	_______________________
Union dues	_______________________	_______________________
Tax preparation fees	_______________________	_______________________
Investment expenses, other than on K-1's	_______________________	_______________________
Gambling losses: (only if you have gambling income)	_______________________	_______________________