









**CONTRIBUTIONS - Retirement Plans and IRAs**

Type of Account (regular IRA, Roth IRA, Coverdell ESA, employer-sponsored retirement plan, SEP, etc.)

Individual or Spousal

Amount Contributed This Year

Before Year-End

After Year-End

Year End Balance

**SPEED PROCESSING**

Enclose front pages of government tax forms that have your name and address labels. Be sure to include the mailing envelopes as well.

Type of Account	Individual or Spousal	Amount Contributed This Year Before Year-End	Amount Contributed This Year After Year-End	Year End Balance

Are you or your spouse an active participant in a qualified retirement plan (including a 401 (K) plan)?

Discuss deductibility or credit availability for contributions with tax preparer.

**DEDUCTIONS - Interest**

Amount

Home mortgage interest paid to financial institutions (Form 1098)	
Home mortgage interest paid to individuals (show name and address)	
Name:	
Address:	
Name:	
Address:	
Date of Mortgage(s)	
Cost of residence & improvements	
Is mortgage on: <input type="checkbox"/> principal residence <input type="checkbox"/> second home	
Percentage points paid on mortgage for new home	
Mortgage prepayment penalties	
Interest to purchase or carry investment property	
Amount of interest paid on student loans (Form 1098-E)	
Were loan proceeds used exclusively for educational expenses (tuition, fees, room and board, and related expenses such as books and supplies)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Was loan taken out for yourself, your spouse, or a dependent (at the time the loan was taken out)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Other	

**DEDUCTIONS - Taxes**

Amount

Income Taxes (state and local)	
Real Estate Tax	
Personal Property Tax (Auto)	
Other Taxes (specify)	
State General Sales Tax	

**ADOPTION CREDIT**

Amount

Amount of expenses paid to adopt a child	
Child's Name?	
Date of Birth?	
Social Security Number?	
Special needs child? <input type="checkbox"/> Yes <input type="checkbox"/> No	

**DEDUCTIONS - Contributions**

NOTE: Written acknowledgement is needed for charitable contributions in excess of \$250

Amount

Cash Contributions (Receipts/canceled checks required)	
Payments over benefits received for charitable events.	
Non-Cash contributions: Attach list showing charity name and address, property description, dates acquired and contributed, how acquired by you (e.g. purchase or gift), cost or adjusted basis, fair market value, and how you determined value. (Form 8283 if over \$500 deduction claimed) Note: For charitable donation of property value in excess of \$5000, additional information maybe required.	
Out of pocket expenses for donated work in conjunction with above or similar organizations & charities.	
Transportation or mileage for charitable work (provide dates).	
Expenses (incurred as duly elected delegate to convention or recognized organization).	
Other Expenses (specify)	

**DEDUCTIONS - Miscellaneous**

Amount

Alimony Paid (list recipient's name and SSN)	
Recipient	
Social Security Number	
Penalty on early withdrawal of savings	
Unreimbursed Employee Expenses: Tools	
Protective Clothing	
Union Professional dues	
Uniforms	
Employment firm fees (if seeking in same trade or business)	
Subscriptions to Professional journals	
Other (specify)	
Tax Return preparation fees	
Investment Expenses	
Safe Deposit Box	
Casualty or theft loss not reimbursed by insurance in excess of \$100	
Was a timely insurance claim filed?	
Contribution to Health Savings Account	
Expenses paid for higher education (not paid by Coverdell ESA or reported for educational credits) for you, spouse or dependent	
Teachers - books, supplies and equipment (Grade(s) Taught _____)	
Gambling losses (up to winnings)	
Other Expenses (specify)	

**PRESIDENTIAL ELECTION CAMPAIGN FUND**

Congress has set up a fund to help pay for Presidential election costs. Do you want \$3 of your tax to go to this fund? \_\_\_\_\_ If you are filing a joint return, does your spouse want \$3 dollars of their tax to go to this fund? \_\_\_\_\_ Note: A "Yes" response will not change your tax or reduce your refund.

...from IRS: Recordkeeping

"You are required by law to keep records that will enable you to prepare a complete and accurate income tax return. Although law generally does not require any special form or records, you must retain all receipts, cancelled checks and other evidence to prove amounts claimed as deductions. You must keep your records for as long as their contents may be material to administering any Internal Revenue Service."

The enclosed information is correct and includes all income for this return.

Taxpayer's Signature

Date