

INTEREST INCOME (bring all 1099's)	Amount	DIVIDEND INCOME (bring all 1099's)	Ordinary	Qualified	Cap. Gain
_____	\$ _____	_____	\$ _____	_____	_____
_____	_____	_____	_____	_____	_____
_____	\$ _____	_____	\$ _____	_____	_____

*** OTHER INCOME and/or ADJUSTMENTS**

Any State Tax Refunds Received last year: **Yes** or **No** \$ _____ **Amount Taxable? (if any)** \$ _____

Alimony Received: TP \$ _____ SP _____

Unemployment Compensation: *Received or Repaid:* TP _____ SP _____

Social Security Received: TP _____ SP _____

Partnerships / Retirement / IRA or Education Distributions (bring all 1099-Rs, K-1s, etc.) \$ _____

Stock Sales (bring 1099's and All Stock Basis Info.) \$ _____

Were you **Lucky** last year? ☺ **Gambling Winnings (W2-G):** \$ _____ \$ _____ ☹ **Gambling Losses:** \$ _____

*** Cost of Solar for your Home or Business (must be 'Purchase', Not Lease!)** \$ _____

*** Health Savings Account: *HSA Distributions, (1099-SA):** \$ _____ ***HSA Contributions, (5498-SA):** \$ _____

CHILD AND DEPENDENT CARE EXPENSES **Please let us know if you have employer provided dependent care benefits.

Provider #1	Provider #2
Name _____	Name _____
St. Address _____ Ph: _____	St. Address _____ Ph: _____
City, State, Zip _____	City, State, Zip _____
SSN / EIN: _____ Amt Paid: _____	SSN / EIN: _____ Amt Paid: _____

SCHEDULE 'A'		NEW STANDARD DEDUCTION RATES!			
SINGLE OR MARRIED FILING SEPARATE		MARRIED FILING JOINT / QUALIFYING WIDOW(ER)		HEAD OF HOUSEHOLD	
FEDERAL	CA STATE	FEDERAL	CA STATE	FEDERAL	CA STATE
\$12,000	\$4,129	\$24,000	\$8,258	\$18,000	\$8,258

MEDICAL EXPENSES (must exceed 7.5% of your Adjusted Gross Income)

Prescriptions (4) \$ _____ **Health Ins Premiums** (7) _____ **Lab fees/ hearing aids** \$ _____

Total doctors, dentists (5) _____ **Long Term Care Ins** (17) _____ **Glasses/contacts/Lasik** (10) _____

Hospitals, clinics (6) _____ **INS. REIMBURSED** (8) < _____ > **Medical Miles:** (52) _____

TAXES PAID ** New... Maximum Limit of \$10,000 **

Real Estate Taxes: *Home* _____ (Land or Other Property) _____ (15) \$ _____

State Estimated Tax paid in Jan. ## _____ Previous Year's State Taxes paid (Year _____) (14) _____

Vehicle Lic. Fee: auto, trailer, boat, RV #1 _____ #2 _____ #3 _____ #4 _____ #5 _____ #6 _____ (18) _____

Luxury Tax (Boat Reg) (18) _____ Sales Tax on Autos, Boats, etc. #1 _____ #2 _____ (93) \$ _____

HOME MORTGAGE LOAN INTEREST (1098-Mortgage Interest) *Date Purchased: _____

1: _____ \$ _____ # 3: _____ \$ _____

2: _____ \$ _____ # 4: _____ \$ _____

Points Paid on New Home or Refi. (not on 1098) _____ (21) \$ _____

Mortgage Interest Paid to a Person: **Name:** _____ **SSN:** _____ (22) _____

Address: _____ **\$ _____ Total Int Paid:** (22) \$ _____

CONTRIBUTIONS (bring a Detailed List along with Donation Receipts, Appraisals, and/or Letters from Charities)

Cash: Church: _____ \$ _____ Misc: _____ \$ _____ (32) \$ _____

Payroll/Out of Pocket : (Classroom teaching supplies, scouts, etc) \$ _____ \$ _____ \$ _____ (31) _____

NonCash Donations: #1 _____ \$ _____ #2 _____ \$ _____ (33) _____

Charitable Travel: (school, scouts, coaching, church, etc.) **Charity:** _____ **Miles:** (53) _____ **Total:** \$ _____

*** MISC DEDUCTIONS FOR "CALIFORNIA SCH A" ☺** Federal - Reservists & Performing Artists Qualify

Prof / Union Dues (42) _____ Job related school (43) _____ Supplies / tools (45) _____

Business journals (43) _____ Investment/IRA fees (43) _____ Tax prep. Fee (45) _____

Cell phone (43) _____ Uniforms/safety gear (43) _____ Legal fees (47) _____

