

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

___ W-2s	___ 1099-INTs	___ 1099-DIV	___ Other 1099s
___ K-1s	___ Tax forms with labels	___ Property tax bill	___ 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

Total rent received	_____
Expenses – Taxes	_____
Utilities	_____
Interest	_____
Insurance	_____
Auto mileage	_____
Repairs	_____
Supplies	_____
Other	_____
_____	_____
_____	_____
_____	_____

OTHER INCOME

If you have other income, please bring all figures and supporting data. Examples:

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	_____
Gambling	_____
Other	_____
_____	_____

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price

Please bring supporting documents

