

Income, Adjustments and Itemized Deductions

<u>Source of Income</u>	<u>Form to be provided</u>	<u>Please X if item applies</u>
Wages	W-2	_____
Taxable and Tax-exempt interest	1099-INT	_____
Taxable and Tax-exempt dividends	1099-DIV	_____
Capital gains	1099-B	_____
Partnerships or S Corporations	Form K-1	_____
State and City refunds	1099-G	_____
IRA, pension or annuity distributions	1099-R	_____
Unemployment	1099-G	_____
Gambling Winnings	W2-G	_____
Social Security income	SSA-1099	_____
Miscellaneous income	1099-MISC	_____
Medical Savings account	1099-MSA	_____

Please provide all tax forms for income received, there is information on these forms that is needed in order to electronically file your return.

Adjustments

Educator expenses _____

Health savings account contribution _____

Self-employed health insurance paid _____

Do you want to make an IRA contribution?
 Roth IRA _____ Traditional _____

Student Loan interest paid _____

Did you pay higher education tuition for yourself or a dependent? _____

Please provide 1098-T _____

Itemized Deductions

Medical and dental expenses (co-pays, prescriptions) _____

Real estate taxes paid during year _____

Home mortgage interest _____

Home equity Interest _____

Donations _____