2007 Tax Worksheet - Please fill out and bring to your appointment!

Taxpayer/Spouse Name	Birthdate	Social Security # (please verify)	Occupation
_____	_____	_____	_____
_____	_____	_____	_____

NEW ADDRESS (if any) _____

PHONE NUMBERS Home_____ Work _____ Cell _____ Fax _____

Email:_____

DEPENDENTS (if new client, list all; otherwise, list changes from last tax year):

Name	Birthdate	Social Security # (please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

SOURCES OF INCOME:	Gross	Federal Tax	State Tax
W-2 _____	$_____	$_____	$_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total W-2	$_____		
1099-R _____	_____	_____	_____
_____	_____	_____	_____
Soc. Security_____	_____		
_____	_____		
1099-MISC_____	_____	_____	_____
_____	_____	_____	_____
Unemployment	_____	_____	_____
State Tax Refund	_____		
Alimony Received	_____		
Gambling Winnings (1099-G)	_____	_____	_____
Other_____	_____		
Total Tax Withheld		$_____	$_____

2007 ESTIMATED TAX PAYMENTS:

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____

Total Amount: $

INTEREST INCOME:

_____ $_____

_____ $_____

_____ $_____

DIVIDEND INCOME:

_____ $_____

_____ $_____

_____ $_____

SPECIAL ADJUSTMENTS:

IRA Deposits $_____

Roth IRA Deposits $_____

Keogh/SEP Deposits $_____

Alimony Paid $_____

Name:_____ SSN:_____

Educator Out-of-Pocket Expenses $_____

Early Withdrawal Penalties $_____

EDUCATION DEDUCTIONS/CREDITS:

Student Loan Interest $_____

Tuition (listed by individual) $_____

Freshman/Sophomore(Hope) $_____

All other Tuition(Lifetime) $_____

Higher Graduation Deduction $_____

Taxpayer Name:

_____ **2007**

PICK UP **MAIL**