

**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)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>SOURCES OF INCOME:</b>	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:**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____
Total Amount: \$				_____

<b>INTEREST INCOME:</b>	\$ _____	Alimony Paid	\$ _____
_____	\$ _____	Name: _____ SSN: _____	
_____	\$ _____	Educator Out-of-Pocket Expenses	\$ _____
_____	\$ _____	Early Withdrawal Penalties	\$ _____

<b>DIVIDEND INCOME:</b>	\$ _____	<b>EDUCATION DEDUCTIONS/CREDITS:</b>	
_____	\$ _____	Student Loan Interest	\$ _____
_____	\$ _____	Tuition (listed by individual)	\$ _____
		Freshman/Sophomore <sub>(Hope)</sub>	\$ _____
		All other Tuition <sub>(Lifetime)</sub>	\$ _____
		Higher Graduation Deduction	\$ _____

**SPECIAL ADJUSTMENTS:**

IRA Deposits	\$ _____
Roth IRA Deposits	\$ _____
Keogh/SEP Deposits	\$ _____

Taxpayer Name: _____	<b>2007</b>
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**PICK UP**

**MAIL**