

2018 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		\$ _____	\$ _____

2018 ESTIMATED TAX PAYMENTS:

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

INTEREST INCOME:

_____	\$ _____
_____	\$ _____
_____	\$ _____

DIVIDEND INCOME:

_____	\$ _____
_____	\$ _____
_____	\$ _____

SPECIAL ADJUSTMENTS:

HSA Contributions (not on W-2)	\$ _____
IRA Deposits (not on W-2)	\$ _____
Roth Deposits (not on W-2)	\$ _____
Keogh/SEP Deposits(not on W-2)	\$ _____

Alimony Paid	\$ _____
Name: _____ SSN: _____	
Educator Out-of-Pocket Expenses	\$ _____
Early Withdrawal Penalties	\$ _____
EDUCATION DEDUCTIONS/CREDITS:	
Student Loan Interest	\$ _____
Tuition (by individual, per form 1098T)	\$ _____
Undergraduate Studies	\$ _____
Graduate Studies	\$ _____
Required Books & Supplies	\$ _____
Other	\$ _____

Taxpayer Name: _____	2018
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ID Verification (for preparer use)

DIGITAL MAIL PICK UP
 (Must request paper copy-\$15 add'l charge applies)