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# TAXES *PhD*

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702.434.FAST (3278)

Tax Year  Name

Address  Phone #

### INCOME

W-2s Wage Statements

1099INT Interest Accounts

1099DIV Dividends

1099Misc Self-Empl., Etc.

1099-R R.R. Pension IRA

W-2G Gambling

1099-G Unemployment

### COPY OF K-1

Trusts

Partnerships

"S" Corporations

Estate

1099-SSA Social Security

1099-RRB Railroad Ret.

Alimony

Tips

Jury Duty

Misc. Income

### MISC DEDUCTIONS

Employee Business Costs

Auto - Business

Meals / Entertainment

Income Tax Preparation

Safe Deposit Box

Legal Fees

Investment Pubs

IRA Fees

Uniforms & Laundry

Union Dues

### Stock Sales

Date Purchased	Date Sold	Purchase Price	Sales Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### CHILD CARE EXPENSE

Provider

Amount

I.D. #

### MOVING EXPENSES

U Haul / Moving Van

Boxes & Packaging

Gas

Lodging

### HEALTH CARE

Insurance

Supp. Medicare

Pharmacy

Dr.'s

Lab Tests / X Rays

Medical Travel/Lodging

### INTEREST PAID

Mortgage

2nd Mortgage

Investment Interest

Points Refinance

Points New Home

### Property Sales

**TAXES PAID**

Sales Tax	<input type="text"/>
State Income Tax	<input type="text"/>
Real Estate Tax	<input type="text"/>
Tax on Auto License	<input type="text"/>

**CASUALTY LOSS**

Fire, Theft, Earthquake	<input type="text"/>
Flood	<input type="text"/>

**CASH CONTRIBUTIONS**

Church	<input type="text"/>
Other	<input type="text"/>
Other	<input type="text"/>

\*Need Receipt for any Cash Contribution over \$250

**NON-CASH CONTRIBUTIONS**

Salvation Army, Goodwill	<input type="text"/>
Deseret Industries	<input type="text"/>
Other	<input type="text"/>
*Need Receipt for any Non-Cash Contribution over \$500	
Charitable Mileage	<input type="text"/>

**ADJUSTMENTS**

Alimony Amount	<input type="text"/>
Paid To	<input type="text"/>
SSN#	<input type="text"/>
IRA Contributions	<input type="text"/>
SEP IRA	<input type="text"/>
Penalty Early Withdrawal	<input type="text"/>

**ESTIMATED TAXES PAID AND CREDITS**

	<u>Due Date</u>	<u>Date Paid</u>	<u>Federal</u>	<u>Due Date</u>
Prior Yr. 4th Qtr	Last January	<input type="text"/>	<input type="text"/>	<input type="text"/>
Prior Yr. Overpayment to this Yr.		<input type="text"/>	<input type="text"/>	<input type="text"/>
First Quarter	April	<input type="text"/>	<input type="text"/>	<input type="text"/>
Second Quarter	June	<input type="text"/>	<input type="text"/>	<input type="text"/>
Third Quarter	September	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fourth Quarter	This January	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Notes**