

<b>Adjustments, Credits, &amp; Deductions</b>		
	<b>Client</b>	<b>Spouse</b>
Alimony paid		
Alimony received		
Economic Recovery Payment received from Social Security, SSI, RRB, or Veterans Benefits		
Retirement account contribution Type of account contributed to: _____		
Self-employed health insurance		
Teacher classroom expenses		
Amount spent to purchase home by first-time homebuyer		
Amount spent for energy efficient improvements (exclude installation costs for insulation, windows, and doors). You must provide the certificate and save all receipts.		
Real estate taxes paid on home and/or other property (include any Forms 1098).		
Personal Property paid based on value (e.g. license tax)		
Sales tax paid on the purchase of a new car, truck, or motorcycle (8,500 lb. or less) or on the purchase of a new motor home.		
Home mortgage interest paid (include all 1098 statements)		
Home mortgage points paid (include all 1098 statements)		
<b>NOTE: You <u>must</u> have written proof of any charitable contributions. Bank records (cancelled check) may support donations under \$250. Donations over \$250 require a letter from the donee showing the name of the donee, the date of the contribution, the amount of the contribution, and proper IRS language. You must have written records (e.g. mileage log) documenting any miles driven for charity work.</b>		
Charitable <b>cash/check</b> contributions made		
Charitable <b>noncash</b> contributions*		
<p><b>*NOTE:</b> If property worth more than \$500 was donated during the year, please provide the information listed below on another sheet of paper:</p> <ul style="list-style-type: none"> <li>• Name and address of recipient organization.</li> <li>• Description of property.</li> <li>• Date of donation.</li> <li>• Date property acquired.</li> <li>• How property was acquired? (Purchase, gift, other)</li> <li>• Cost of property. (If acquired by gift, the donors' cost)</li> <li>• Fair market value of property at the time of donation.</li> <li>• Method used to determine fair market value (appraisal, garage sale)</li> </ul> <p><b>Noncash gifts valued at more than \$5,000 require special paperwork.</b></p>		
Number of miles driven for charitable service		
Previous year's tax preparation fees		
Out-of-state purchases on which no sales tax was collected		

<b>♥ Child Care Costs</b>				
Child	Expenses Incurred While You/Spouse Worked	Child Care Provided by Employer	Name & Address of Care Provider	Social Security # OR EIN of Provider

**♥ Education Costs**

Please include a copy of the student's Form 1098-T and/or 1098-E and an account statement from the institution.

Student	College	Year Started College	Tuition Paid (directly or by loan)	Course Books/Materials Paid (directly or by loan)	Student Loan Interest Paid

Dependent Student Works: full-time  part-time  Check to see if the student needs to file a return.

**♥ Unreimbursed Job-Related Expenses (Form 2106; Not self-employed)**

**NOTE: It is always better to arrange for an accountable reimbursement plan with your employer.**

	Client	Spouse
Mileage:		
Month/year vehicle was purchased		
Make and year of vehicle		
Total miles driven for year (business + personal):		
Odometer reading: 01/01:		
Odometer reading: 12/31:		
Business miles driven (Do not include commuting!)		
Parking fees, tolls, and transportation (e.g. by train or bus)		
<b>NOTE: You must maintain written records (e.g. mileage log) documenting any miles driven for your work. The IRS will not allow a deduction for undocumented mileage.</b>		
Travel expense while away from home overnight (lodging, airplane, car rental, etc.) <b>Do not</b> include meals and entertainment.		
<b>Total</b> meals & entertainment		
Union dues:		
Professional memberships:		
Supplies purchased:		
Trade publications, books, and periodicals:		
Continuing education, classes, seminars, etc. :		
Uniforms required by employer and not suitable for ordinary wear or required protective clothing (e.g. stoles, hard hats, safety shoes)		