## INDIVIDUAL TAX RETURN WORKSHEET

Please call our office if you would like to receive organizer worksheets with your specific information or worksheets for rental, farm or business tax matters

Taxpayer (T)	Spouse (S)
SSN (if new client)	SSN (if new client)
DOB (if new client)	DOB (if new client)
Cell ph #	Cell ph #
Email address:	Email address:
Address (if new)	
County:	School District:
FOR DIRECT DEPOSIT OF REFUND Bank name Routing Number Account Number Checking or savings	9S:

## PLEASE BRING IN THE FOLLOWING:

- \* ALL W2s, 1099 / 1098 (interest, dividend, Patr. Dividend Etc.)
- \* ALL tax forms / Correspondence received from the government
- \* Documents concerning retirement plan contributions / withdrawals
- \* Year-end Social Security benefit statements
- \* College tuition expense documentation
- \* Any health insurance coverage statements (1095-A, 1095-B, or 1095-C)

Any new dependents this tax year ? (circl	.e one) YES NO	
if yes: Name:	DOB	SSN
Name:	DOB	SSN
	ITEMIZED DEDUCTIONS	S WORKSHEET
MEDICAL OUT-OF-POCKET EXPENSES:	\$	TAXES PAID:
(detail)	\$	Real Estate \$
	\$	Auto license \$
Charitable Contributions:		Other taxes \$
Total amount donated:	\$	
Non- cash contributions (date/charity)	\$	

Peters & Longmuir, PLC		319-334-9992
INTEREST PAID:		CHILDCARE EXPENSE:
Name / address of mortgage holder:		Number of qualifying children this year:
		Daycare provider name:
Mortgage interest	\$	Daycare provider address:
Points paid	\$	
Student loan interest	\$	Daycare provider SS #:
		Amt \$ paid each child:
L		
OTHER:		
Tax preparation	\$	Did you pay tuition or related expenses to a college or
Volunteer Firefighters EMS credit?	\$	trade school this year? ( for yourself or dependents)
Private school tuition & textbooks K-12	\$	YES / NO Amount paid \$
Extra-curricular activities expenses K-12	\$	(please bring 1099T receipt)
Iowa college savings plan	\$	Name of school:
Educator expenses	\$	

## **GENERAL QUESTIONS:**

YES / NO	Did your marital status change during this year? if yes, explain:				
YES / NO	Can you or your spouse be claimed as a dependent by someone else?				
YES / NO	Were you, your spouse, or any dependents issued an Indentity Protection PIN (IP PIN)				
	if yes, explain:				
YES / NO	Did you have any changes in dependents during this year?				
	if yes, explain:				
YES / NO	Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?				
	yes? Provide copies of Form 1095-A				
YES / NO	Did you buy or sell any stock, bonds, or other investments during the year?				
YES / NO	Did you rent out your home or use it for business?				
YES / NO	Did you have any debts cancelled or forgiven this year?				
YES / NO	Did you receive income or incur expenses as an independent contractor (e.g., Uber, Instacart, DoorDash)?				
	if YES, Provide documentation				
YES / NO	Did you make any contributions to IRA, Roth, Keogh, SIMPLE, SEP, 401(k), other qualified retirement plan this year?				
YES / NO	Did you execute any rolloever from an IRA, Roth, Keogh, SIMPLE, 401K or other retirement plans during the year?				
YES / NO	Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself,				
	your spouse, or your dependents during the year? (even if classes were attended in another year)				
YES / NO	Did you pay student loan interest for yourself, your spouse, or your dependents during the year?				
	if YES, amount of interest that was paid	\$			
YES / NO	did you make any energy-efficient improvements to your main home during the year?				
YES / NO	Did you receive any notices from the IRS or state taxing authority?		if YES, explain:		
YES / NO	Energy efficiency improvements (windows, furnace, A/C)		if YES, explain:		
YES / NO	Solar / Wind / Geothermal installed this	if YES, explain:			
YES / NO	Purchase new Electric Vehicle	Model	\$ Amt. paid:		