

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 REFUNDS (a copy of a voided check or bank card is preferred)

Bank name _____
Routing Number _____
Account Number _____
Checking or savings _____

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 ? (circle one) YES NO

if yes: Name: _____ DOB _____ SSN _____
Name: _____ DOB _____ SSN _____

ITEMIZED DEDUCTIONS WORKSHEET

MEDICAL OUT-OF-POCKET EXPENSES:	\$ _____	TAXES PAID:	
_____	\$ _____	Real Estate	\$ _____
	\$ _____	Auto license	\$ _____
Charitable Contributions:		Other taxes	\$ _____
Total amount donated:	\$ _____		
Other than cash contributions (date/charity)	\$ _____		

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

YES / NO Energy efficiency improvements (windows, furnace, A/C) if YES, explain: _____

YES / NO Solar / Wind / Geothermal installed this year? if YES, explain: _____

YES / NO Purchase new Electric Vehicle Model \$ Amt. paid: _____