

# TAX INFORMATION FOR THE YEAR \_\_\_\_\_

## INTEREST

Payer	Amt.	Payer	Amt.

## INCOME

### DIVIDENDS

Payer	Ordinary Income	Capital Gains

### OTHER INCOME

Type of Income	Amt.
Alimony	
Self-Employment	
Pensions & Annuities	
Rents	
Royalties	
Estates & Trusts (please bring the K-1)	
Jury Duty	
Gambling or Lottery Winnings	
Partnership (please bring the K-1)	
S Corporation (please bring the K-1)	
Long-Term Care Benefits	
Traditional IRA	
Roth IRA	
Education IRA	
Tips	
Prizes or Awards	
Hobby Income	
Commissions	
State or Local Tax Refund	
Federal Tax Refund	
Unemployment Compensation	
Social Security	
Railroad Retirement	
Other (list)	

Bring all statements showing interest, dividends, and other income:

### GAINS & LOSSES FROM SALES OF STOCK

Description	Date Purchased	Date Sold	Sales Price	Cost of Stock

### LOSSES FROM CASUALTIES (Fire, Flood, Lightning, Wind, Water, Car Accidents) AND THEFT

Description	Date	Cost/Basis	FMV After	FMV Before	Ins. Reimburs.

### OTHER INFORMATION

Description	Tax Payer	Spouse	Other	Amount
Traditional IRA Contrib.				
Student Loan Int. Paid				
Jury Duty repaid to Emp.				
Moving Expenses				
Forfeited Interest				
Unemploy. Comp repaid				
Tuition and Related Fees				

Bring all relevant papers relating to the sale and acquisition of property. Include escrow papers closing statements, cost of permanent improvements. Also, bring all Form 1099's and Schedule K-1, Stock buy and sell papers.