

**2019 Tax Worksheet - Please fill out and bring to your appointment!**

**Taxpayer/Spouse Name** \_\_\_\_\_ **Birthdate** \_\_\_\_\_ **Social Security # (please verify)** \_\_\_\_\_ **Occupation** \_\_\_\_\_

**NEW ADDRESS (if any)** \_\_\_\_\_

**PHONE NUMBERS** Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_ Fax \_\_\_\_\_

**Taxpayer Email:** \_\_\_\_\_ **Spouse Email:** \_\_\_\_\_

**DEPENDENTS (if new client, list all; otherwise, list changes from last tax year):**

Name	Birthdate	Social Security # (please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**SOURCES OF INCOME:**

	Gross	Federal Tax	State Tax
W-2 _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total W-2	\$ _____	_____	_____
1099-R _____	_____	_____	_____
Soc. Security _____	_____	_____	_____
1099-MISC _____	_____	_____	_____
_____	_____	_____	_____
Unemployment _____	_____	_____	_____
State Tax Refund _____	_____	_____	_____
Alimony Received _____	_____	_____	_____
Gambling Winnings (1099-G) _____	_____	_____	_____
Other _____	_____	_____	_____
Total Tax Withheld		\$ _____	\$ _____

**2019 ESTIMATED TAX PAYMENTS:**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Date Paid: _____	_____	_____	_____	_____
Amount Paid: _____	_____	_____	_____	_____
			Total Amount: \$	_____

**INTEREST INCOME:**

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**DIVIDEND INCOME:**

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**SPECIAL ADJUSTMENTS:**

HSA Contributions (not on W-2) \$ \_\_\_\_\_

HSA Distributions (Form 1099-SA) \$ \_\_\_\_\_

IRA Deposits (not on W-2) \$ \_\_\_\_\_

Roth Deposits (not on W-2) \$ \_\_\_\_\_

Keogh/SEP Deposits(not on W-2) \$ \_\_\_\_\_

Alimony Paid \$ \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Educator Out-of-Pocket Expenses \$ \_\_\_\_\_

Early Withdrawal Penalties \$ \_\_\_\_\_

**EDUCATION DEDUCTIONS/CREDITS:**

Student Loan Interest \$ \_\_\_\_\_

Tuition (by individual, per form 1098T) \$ \_\_\_\_\_

Undergraduate Studies \$ \_\_\_\_\_

Graduate Studies \$ \_\_\_\_\_

Required Books & Supplies \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_

**2019**

**ID Verification (for preparer use)**

**DIGITAL MAIL PICK UP**  
(Must request paper copy-\$15 add'l charge applies)