

TAXPAYER'S NAME & ADDRESS \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ SS# \_\_\_\_\_ PHONE \_\_\_\_\_

SPOUSE'S NAME & ADDRESS \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ SS# \_\_\_\_\_ PHONE \_\_\_\_\_

**Please Bring the Following:**

- \_\_\_ Tax Booklets/labels
- \_\_\_ All W-2's and 1099's
- \_\_\_ Buy/Sell Statements
- \_\_\_ Stocks/Bonds
- \_\_\_ Real Estate
- \_\_\_ Installment Sales
- \_\_\_ 2007 Tax Returns
- \_\_\_ Payroll information for house help

**CONTRIBUTIONS**

- \_\_\_ Cash Contributions
- To \_\_\_\_\_ \$ \_\_\_\_\_
- To \_\_\_\_\_ \$ \_\_\_\_\_
- To \_\_\_\_\_ \$ \_\_\_\_\_
- To \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_ Volunteer work
- \_\_\_ Expenses \$ \_\_\_\_\_
- \_\_\_ Mileage \_\_\_\_\_
- \_\_\_ Other than cash  
(list items donated & estimate fair market value)
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_

**CHILD CARE**

- \_\_\_ Number of children cared for \_\_\_\_\_
- Amount \$ \_\_\_\_\_
- Provider Name \_\_\_\_\_
- SS #/EIN # \_\_\_\_\_

**MEDICAL DEDUCTIONS**

- \_\_\_ Prescription medicines \$ \_\_\_\_\_
- \_\_\_ Health Insurance Premiums \$ \_\_\_\_\_
- \_\_\_ Doctor/Dentist/Hospitals \$ \_\_\_\_\_
- \_\_\_ Glasses/Dentures/Hearing \$ \_\_\_\_\_
- \_\_\_ Miles for medical \_\_\_\_\_

**TAX DEDUCTIONS**

- \_\_\_ Real Estate Tax \$ \_\_\_\_\_
- \_\_\_ Personal property tax \$ \_\_\_\_\_

**INTEREST DEDUCTIONS**

- \_\_\_ Home mortgage to Bank \$ \_\_\_\_\_
- \_\_\_ Home mortgage to person \$ \_\_\_\_\_
- Name \_\_\_\_\_
- Address \_\_\_\_\_
- SS# \_\_\_\_\_

CHILD'S NAME	SS #	DATE OF BIRTH
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**IRA CONTRIBUTIONS**

- Taxpayer \$ \_\_\_\_\_
- Spouse \$ \_\_\_\_\_

**MISCELLANEOUS DEDUCTIONS**

- \_\_\_ Casualty/Theft losses
- \_\_\_ Union dues
- \_\_\_ Professional dues
- \_\_\_ Prof. Publications & books
- \_\_\_ Tools/Supplies/Safety Equip (for work)
- \_\_\_ Uniforms
  - Purchase \$ \_\_\_\_\_
  - Upkeep \$ \_\_\_\_\_
- \_\_\_ Business travel not reimbursed
  - Mileage \_\_\_\_\_
- \_\_\_ Job related education
- \_\_\_ Tuition
- \_\_\_ Books/supplies \$ \_\_\_\_\_
- \_\_\_ Travel/Air fare \$ \_\_\_\_\_
- \_\_\_ Job seeking expenses
- \_\_\_ Resumé costs \$ \_\_\_\_\_
- \_\_\_ Long distance phone \$ \_\_\_\_\_
- \_\_\_ Travel
  - Air fare \$ \_\_\_\_\_
  - Mileage \_\_\_\_\_
  - Parking \$ \_\_\_\_\_
  - Food/Bed \$ \_\_\_\_\_

**FED. EST. TAX PAYMENTS MADE FOR 2008**

- #1 April 15, 2008 \$ \_\_\_\_\_ #3 Sept. 15, 2008 \$ \_\_\_\_\_
- #2 June 15, 2008 \$ \_\_\_\_\_ #4 Jan. 15, 2009 \$ \_\_\_\_\_

# TAX CHECKLIST 2008

The following items can be used as possible tax deductions. Please check the items that are Applicable to you.

- More than one employer
- Use of own auto for job
- Licenses/permit for job
- Job related schooling
- Move because of job change
  
- Self-employment
- Unreimbursed business expenses
- Payment of estimated taxes
- Business losses previous years
- Tips unreported to employer
  
- You and spouse work
- Child Care expenses
- Pay penalty on time deposit
  
- Money owed you, bad debt
- Rental property owned
- Buy/Sell business property
- Worthless securities
- Partnership Income (K-1)
- Pension/Retirement Income
  
- Receive Alimony
- Pay Alimony
- Lump sum distribution
- Unemployment compensation \$ \_\_\_\_\_
  
- Pay additional State Tax in 2008 \$ \_\_\_\_\_
- Refund of 2007 State Tax \$ \_\_\_\_\_
- Foreign bank account
- Buy or sell real estate
- Refinance your home
- Social Security Income
- Interest Income (1099's)
- Dividends from stock
- Sale of stocks

**SELF-EMPLOYED BUSINESS**

GROSS INCOME	_____
EXPENSES	_____
Cost of Sales, Materials, etc.	_____
Advertising	_____
Bank Service Charges	_____
Dues & Publications	_____
Postage & Freight	_____
Insurance	_____
Interest ( <i>Business Related</i> )	_____
Legal & Professional Fees	_____
Office Expenses	_____
Rent/Lease Business Property	_____
Repairs	_____
Supplies	_____
Taxes & Licenses	_____
Travel Expenses ( <i>Out of Town</i> )	_____
Meals & Entertainment	_____
Telephone	_____
Utilities	_____
Wages & Salaries	_____
Health Ins. Premiums	_____
<i>(Paid as Self-employed Individual)</i>	
VEHICLE EXPENSES	
Business Miles	_____
Commuting Miles	+ _____
Other Personal Miles	+ _____
<b>Total Vehicle Miles</b>	= _____
ACTUAL EXPENSES PAID	
Gas and Oil	_____
Repairs, Tires, Car Washes	_____
Insurance	_____
Property Taxes ( <i>Registration</i> )	_____
OTHER MISC. EXPENSES	
_____	_____
_____	_____
_____	_____
_____	_____

**RENTAL INCOME & EXPENSES** (*Detail Each Unit*)

GROSS INCOME	_____
EXPENSES	_____
Advertising	_____
Cleaning & Maintenance	_____
Insurance	_____
Interest	_____
Repairs	_____
Taxes	_____
Utilities	_____
VEHICLE EXPENSES	
Business Miles	_____
Commuting Miles	+ _____
Other Personal Miles	+ _____
<b>Total Vehicle Miles</b>	= _____
ACTUAL EXPENSES PAID	
Gas and Oil	_____
Repairs, Tires, Car Washes	_____
Insurance	_____
Property Taxes ( <i>Registration</i> )	_____
OTHER MISC. EXPENSES	
_____	_____
_____	_____
_____	_____
_____	_____
<b>EQUIPMENT PURCHASED</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____