

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_  
 Spouse: \_\_\_\_\_ SS# \_\_\_\_\_  
 Address: \_\_\_\_\_ Phone# (Wk) \_\_\_\_\_ (Hm) \_\_\_\_\_  
 City, State: \_\_\_\_\_ E-Mail Address \_\_\_\_\_

NAME:(1st & last name as on SS card)	Date of Birth:	SOCIAL SECURITY#:	Relationship:	Student/Disabled(x)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Did you receive, sell, exchange or dispose of any virtual currency? Yes or No If your only transactions involving virtual currency were purchases of virtual currency with real currency, you are not required to answer Yes, you will answer No.

“Stimulus Check (s)” rec’d in 2021 - Need amount and Form 1444: \_\_\_\_\_

“Advance Child Tax Credit” rec’d in 2021 – Need amount and IRS Letter 6419: \_\_\_\_\_

Unemployment Comp: \_\_\_\_\_ **CHILD CARE** - Amount(s) Paid: \$ \_\_\_\_\_  
 Social Security Rec'd: \_\_\_\_\_ for which child \_\_\_\_\_  
**CANCELLATION OF DEBT: give reason** Paid To: \_\_\_\_\_  
 Include 1099: \_\_\_\_\_ Address: \_\_\_\_\_  
 Other Income (Alimony/prizes/etc) \_\_\_\_\_  
 Gambling winnings – Need 1099G \_\_\_\_\_ SS# or ID#: \_\_\_\_\_

**\*\*\* ( Business / Rental / Farm / Capital Gains - List on separate sheet )**

**ITEMIZED DEDUCTIONS**

**Medical Expenses:**

Doctors/Dentist/Hospital: \_\_\_\_\_  
 Glasses/Hearing aids/other \_\_\_\_\_  
 Health/Dental/Vision Insurance: \_\_\_\_\_  
 Long-Term Care Ins. (him): \_\_\_\_\_ (her) \_\_\_\_\_  
 Prescription Drugs: \_\_\_\_\_  
 Nursing or LongTerm Care Facility: \_\_\_\_\_  
 Miles driven for medical: \_\_\_\_\_

**Taxes:**

Real Estate/Property Taxes: \_\_\_\_\_  
**Taxes on car Tags** \_\_\_\_\_  
 Sales Tax on Motor Vehicles \_\_\_\_\_  
**Online purchases that you did not pay Ala Sales tax on-  
 Total of Online Purchases:** \_\_\_\_\_

**Interest Paid:**

Home Mortgage Interest-(need 1098):  
 1<sup>st</sup> Mortgage \_\_\_\_\_  
 2<sup>nd</sup> Mortgage \_\_\_\_\_  
 Mortgage Interest paid to an Individual \_\_\_\_\_  
 Name: \_\_\_\_\_

Home Equity Interest \_\_\_\_\_ \*\*  
 \*\*(We need to know amount borrowed & use of monies)

**Mortgage Ins. Premium (MIP)** \_\_\_\_\_

\*\***Miscellaneous Intemized deductions** are not deductible on your Federal tax return but are on State tax return.

**Contributions:**

Cash Or Check: \_\_\_\_\_  
 (For all contributions you must have a receipt)  
 Charitable miles: \_\_\_\_\_  
 \* Non-cash contributions: \_\_\_\_\_  
 \*(If over \$500-must have itemized-dates-fair cont. value)  
**\*\*Auto Business Ex: (If self-employed enter on back)**  
 Vehicle Description: \_\_\_\_\_

Total Miles driven: \_\_\_\_\_  
 Commuting Miles : \_\_\_\_\_  
 Business Miles: \_\_\_\_\_

**\*\*Business Travel Expenses: (If self-emp enter on back)**

# of nights away from home: \_\_\_\_\_  
 (This is used to figure the meal allowance amount)  
 Lodging: \_\_\_\_\_  
 Plane,train,taxi,tips: \_\_\_\_\_  
 Cleaning & Laundry: \_\_\_\_\_  
 Other: \_\_\_\_\_  
 Less - Employer Reimb. of travel Exp:(\_\_\_\_\_)

**\*\*Miscellaneous: (If self-employed enter on back)**

Union Dues: \_\_\_\_\_  
 Tax Preparation fees: \_\_\_\_\_  
 Uniforms: \_\_\_\_\_  
 Job Seeking Expenses: \_\_\_\_\_  
 Tools/Safety Equip: \_\_\_\_\_  
 Safe Deposit Box: \_\_\_\_\_  
 Bus.Related Education Exp: \_\_\_\_\_  
 Investment Fees: \_\_\_\_\_  
 Gambling losses: \_\_\_\_\_

**\*Other Deductions:** \*These items may or may not be deductible!

IRA Cont.-(Taxpr) \_\_\_\_\_ (Spouse) \_\_\_\_\_  
Roth Cont.-(Taxpr) \_\_\_\_\_ (Spouse) \_\_\_\_\_

**Did you make Estimated Tax Payments for 2021?**

Date made	Federal	State
1 <sup>st</sup> Qtr. _____	_____	_____
2 <sup>nd</sup> Qtr. _____	_____	_____
3 <sup>rd</sup> Qtr. _____	_____	_____
4 <sup>th</sup> Qtr. _____	_____	_____
Totals: _____	_____	_____

**Education Expenses: (need 1098-T from school)**

Student: \_\_\_\_\_  
Freshman, Sophomore, Junior, Senior – **CIRCLE ONE**

Name of University: \_\_\_\_\_  
Amt. of Tuition Pd (From 1098) \_\_\_\_\_  
Amt. of Scholarships (From 1098) \_\_\_\_\_  
Books & Supplies:(Need receipts) \_\_\_\_\_

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**Self-Employed Income: (If new LLC- we need paperwork)**

Bus. Activity/Product: \_\_\_\_\_  
Fed ID #: \_\_\_\_\_

**Total Income:** \_\_\_\_\_

Inv. (Beg. Of Year) \_\_\_\_\_  
Purchases: \_\_\_\_\_  
Contract Labor: \_\_\_\_\_  
Materials: \_\_\_\_\_  
Inv. (End of Year): \_\_\_\_\_

**Expenses:**

Auto mileage: Total \_\_\_\_\_  
Commuting: \_\_\_\_\_ Business: \_\_\_\_\_  
Advertising: \_\_\_\_\_  
Commissions/Fees: \_\_\_\_\_  
Ins.(other than health): \_\_\_\_\_  
Ins.(Health for Self Employed) \_\_\_\_\_  
Interest: Mortgage \_\_\_\_\_ Other: \_\_\_\_\_  
Legal/Prof. fees: \_\_\_\_\_  
Office Exp: \_\_\_\_\_  
Rent on Veh./Machinery/Equip.: \_\_\_\_\_  
Rent on other Bus. Property: \_\_\_\_\_  
Repairs/Maintenance: \_\_\_\_\_  
Supplies: \_\_\_\_\_  
Taxes & Licenses:(Lic)= \_\_\_\_\_ (P/R tax) \_\_\_\_\_  
(sales tax)= \_\_\_\_\_ (Property tax)= \_\_\_\_\_  
Travel(Motel,Airplane) \_\_\_\_\_  
Deductible Meals: \_\_\_\_\_  
Utilities: \_\_\_\_\_  
Wages: \_\_\_\_\_  
Bank Charges: \_\_\_\_\_ Dues: \_\_\_\_\_  
**Other:(list)** \_\_\_\_\_

**Rental Income:**

Property Desc: \_\_\_\_\_  
Address: \_\_\_\_\_

**Total Rent Rec'd:\$** \_\_\_\_\_

**Expenses:**

Auto/Travel(Mileage) \_\_\_\_\_  
Advertising: \_\_\_\_\_  
Cleaning/Maintenance: \_\_\_\_\_  
Commissions: \_\_\_\_\_  
Insurance: \_\_\_\_\_  
Legal/Prof. fees: \_\_\_\_\_  
Management fees: \_\_\_\_\_  
Mortgage Interest: \_\_\_\_\_ Other Int: \_\_\_\_\_  
Repairs: \_\_\_\_\_  
Supplies: \_\_\_\_\_  
Taxes: \_\_\_\_\_  
Utilities: \_\_\_\_\_  
Other.: \_\_\_\_\_

**Assets Bought or Sold:**

Description: \_\_\_\_\_  
Date placed in service: \_\_\_\_\_  
Purchase price: \$ \_\_\_\_\_  
Sold for: \$ \_\_\_\_\_

**If New Rental Property - Date bought & basis:**

Date Bought: \_\_\_\_\_  
Total Cost: \_\_\_\_\_  
Less Land Value:( \_\_\_\_\_ ) = \_\_\_\_\_

\*\*\*\*\*

**Farm Income & Expenses list on separate sheet.**

**Assets Bought or Sold:**

Description: \_\_\_\_\_  
Date: \_\_\_\_\_  
Purchase price:\$ \_\_\_\_\_  
Sold for: \$ \_\_\_\_\_

**Other Questions:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_