

Income Tax Record - Courtesy of Syreeta, Inc.

INCOME

W2's (Wage Statements)	_____
1099-INT (Interest Statement)	_____
1099-DIV (Dividend Statement)	_____
1099-MISC (Extra Income, Rent, Prizes, etc.)	_____
1099-R (Pension, IRA Statements)	_____
W2G (Winnings from Gambling, Lottery)	_____
1099G (Unemployment Statement)	_____
1099G (State Tax Refund)	_____
1099B (Investment Sale Statement)	_____
1099S (Property Sale Statement)	_____
K-1 from: Partnership, Limited Partnership, S-Corporation, Trust or Estate	_____
SSA-1099 (Social Security Statement)	_____
RRB-1099 (Railroad Retirement Statement)	_____
Alimony	_____
Tips	_____
Scholarships	_____
Jury Duty	_____
Investment Transation	_____

ESTIMATED TAX PAID

Federal	<u>Amount</u>	<u>Date Paid</u>
Due 1-15	_____	_____
Due 4-15	_____	_____
Due 6-15	_____	_____
Due 9-15	_____	_____
<u>State</u>		
Due 1-15	_____	_____
Due 4-15	_____	_____
Due 6-15	_____	_____
Due 9-15	_____	_____

CASUALTY/THEFT LOSS

<u>Damage from:</u>	
Fire	_____
Wind	_____
Lightning	_____
Flood	_____
Drought	_____
Accident	_____
<u>Loss from:</u>	
Theft	_____
Embezzlement	_____

Do Not Include: Loss from lost or misplaced property.

MOVING EXPENSES

<u>Packing & Move Belongings</u>	
Storage (30 days)	_____
Insure Belongings	_____
# of Miles to Move	_____
Gas/Oil During Move	_____
Lodging During Move	_____

Do Not Include: Prepaid rent, security deposit, loss on sale of home, meals, or premove expenses.

CHILD CARE EXPENSE

Provider	<u>Tax ID</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

IRA CONTRIBUTIONS

	<u>Amount</u>
You	_____
Spouse	_____

Note: Your IRA deposit can be made until April 5 and still apply to this tax year

HEALTH CARE

Health/Dental Insurance	_____
Supplemental Medicare (B)	_____
X-Ray	_____
Lab Fees	_____
Nursing Care	_____
Hospital	_____
Drug/Alcohol Treatments	_____
Hearing Aids (including batteries)	_____
Eyeglasses/Contacts	_____
Braces/Orthopedic care	_____
Crutches, Wheelchair	_____
Ambulance	_____
Medical Mileage #	_____
Lodging for Treatment	_____
Medical Doctor	_____
Dentist	_____
Orthodontist	_____
Eye Doctor	_____
Chiropractor	_____
Physical Therapist	_____
Psychitrist	_____

Do Not Include: Cosmetic Surgery, Life or Income Insurance, Medicare (A), Illegal Operations or Drugs, Non-prescription Drugs, Funeral, Burial, Cremation, etc.)

MISCELLANEOUS

<u>Job & Investment</u>	
Union Dues	_____
Professional Dues	_____
Trade Journal Subscriptions	_____
Income Tax Preparation	_____
Safe Deposit Box	_____
Tools (work related)	_____
Uniforms (cost)	_____
Uniforms (cleaning)	_____
Employment Agency Fees	_____
Physical Exams (work)	_____
Supplies (work)	_____
Tution (improve job)	_____
Entertain Clients	_____
Lodging	_____
Meals (away from home)	_____
<u>Mileage:</u>	
Between 1st & 2nd Job	_____
Job Hunt	_____
Education (job)	_____
Business	_____
_____	_____
_____	_____
_____	_____

Do Not Include: Personal legal fees, fines, penalties, mileage to and from work, melas during regular work hours, or travel as a form of education.

TAXES PAID

Real Estate	_____
Personal Property	_____

Do Not Include: Excise, slaes, federal or inheritance taxes.

INTEREST PAID

Mortgage (include From 1098)	_____
Investment	_____
Installment sale	_____
Student Loans	_____
Charge Card	_____

CHARITABLE GIFTS

Church	_____
Red Cross	_____
United Way	_____
Salv. Army, Goodwill	_____
Scouts	_____
Humane Society	_____
Schools, Hospitals	_____
Public Radio/TV	_____
Environmental	_____
Wildlife	_____
Health Research Org (i.e. Heart, Cancer, etc.)	_____
Non-Cash:	
Goodwill	_____
Supplies for Charity	_____
Food Drives	_____
Mileage #	_____

SALE OF HOME

<u>Costs & Improvements</u>	
Lawn/Garden Installation	_____
Driveway/Sidewalk	_____
Septic/Well	_____
Sewer Assessment	_____
Fences/Gates	_____
Patio/Deck	_____
Roof	_____
Finish Basement, Attic	_____
Ceilings/Flooring	_____
Cabinets/Cupboards	_____
Windows	_____
Garbage Disposal	_____
Range Hood	_____
Extra Plumbing	_____
Central A/C	_____
Electronic Air Filter	_____
Rewiring	_____
Appliances	_____
Antenna/Stellite Dish	_____
Lawn Sprinkling System	_____
Locks	_____
Insulation	_____
Intercom System	_____
Fire/Burglar Alarm	_____
Ceiling Fans	_____
Fireplace/Heater	_____

Do Not Include: Paint, routine repairs, or interest on assessments.