

TAX RECORDS

TAXPAYER NAME: _____ SPOUSE NAME: _____
 BIRTHDATE: _____ BIRTHDATE: _____
 ADDRESS: _____ CITY: _____ STATE: _____ ZIP: _____
 HOME PHONE: _____ CELL PHONE: _____ E-MAIL: _____

DEPENDENTS					
NAME	SSN#	NO. OF MOS. IN HOME	INCOME	RELATIONSHIP	DATE OF BIRTH

INCOME

W-2 Income (LIST EMPLOYERS)		DIVIDEND INCOME (attach 1099-DIV's)			
Employer Name	Amount	Payee Name	Amount	Payee Name	Amount
Please attach all W-2 Forms					

OTHER INCOME

Type of Income	Amount
Alimony Received (not child support)	
Commissions/Bonuses (not reported on W-2)	
Awards/Gambling Winnings (Enclose 1099-MISC. W2G)	
Farm (Furnish Schedule or Detail)	
Hobby (Income & Expenses)	
IRA/Keogh Distribution (Enclose Form 1099-R)	
Jury Duty (Or other Public Service)	
Pensions/Annuities (Enclose 1099-R or detail)	
Partnerships/Estates/Trusts (Enclose K-1 Forms)	
Social Security (attach 1099-SSA)	
Tips/Gratuities (not reported on W-2)	
Unemployment Compensation (Enclose 1099-G)	
Other (Explain):	
Other (Explain):	

SELF EMPLOYMENT

Income	
Description	Amount
Income / Checks & Cash Rcv'd	
Income / Barter FVM Goods or Services Rcv'd	
Other:	
Expenses	
Description	Amount
Advertising	
Auto and Truck (Fill out Vehicle Worksheet)	
Business Meals / Entertainment	
Business Phone	
Contract Labor / Subcontractors	
Equipment / Tools Purchased (attach list)	
Insurance	
Interest on Business Loan(s)	
Legal & Professional Fees	
Office Expenses	
Rents or Lease	
Repairs / Maintenance	
Supplies	
Taxes / Licenses	
Utilities	
Wages	
Other Expenses (attach list)	

GAINS AND LOSSES FROM SALE OF PROPERTY/INVESTMENTS

Description (Enclose transaction recap)	Date Acquired	Date Sold	Sale Price	Cost

Please attach all 1099-B and 1099-S Forms