

Capital Sale Information: (Stocks, Bonds, Property, Investments, Real Estate, Home**, Etc.)**

Description	Date Acquired	Date Sold	Sales Price	Cost Basis
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

***If you sold real estate, please provide closing statement (HUD-1) **Please call your broker to verify cost basis.**

Other Income

Did you have any Self-Employment income? _____ YES _____ NO

*If yes please attach schedule of income and expense for activity during the year

Did you use a vehicle for business purpose? _____ YES _____ NO

*If yes please attach milage, make, model and expense for the year

Did you receive any rental income? _____ YES _____ NO

*If yes please attach schedule of income and expense for activity during the year

Did you receive any Schedule K-1's from Partnerships or S-Corporations: _____

Deductions

Medical	\$ _____	Taxes	\$ _____
Prescription Drugs:	\$ _____	Real Estate Taxes:	\$ _____
Doctors, Hospitals:	\$ _____	Vehicle Taxes:	\$ _____
Insurance:	\$ _____	Personal Property Tax:	\$ _____
Nursing Home Facilities:	\$ _____		
Travel:	\$ _____	Mortgage Interest	
Others (Aids, Glasses, Etc):	\$ _____	_____	\$ _____
Long Term Health Care Ins:	\$ _____	_____	\$ _____

Other

Tax Preparation Fees:	\$ _____
Union/Professional Fees:	\$ _____
Safe Deposit Rental:	\$ _____
Applicable Attorney Fees:	\$ _____

Unreimbursed Employee Business Expense

Travel:	\$ _____
Meals/Ent:	\$ _____
Vehicle Milage:	\$ _____
Gas/Repairs:	\$ _____

Charitable Contributions: ****If Non-Cash contribution is over \$500.00 please include receipt.**

Cash	\$ _____	Non-cash	\$ _____
Non-cash	\$ _____	Non-cash	\$ _____
Non-cash	\$ _____	Non-cash	\$ _____

Other Information

Did you make a Contribution to a 529 plan (education) in 2015:	\$ _____
Did you make a payment to a retirement plan (IRA, Keogh, SEP, Simple IRA)?	\$ _____
Did you suffer any unreimbursed loss or theft? _____	Did you sell your principal residence? _____
Did you have any moving expenses? \$ _____	Did you pay or receive any alimony? _____
Did you sell any business property? _____	Did we prepare your tax return last year? _____
Did you receive any State tax refund? \$ _____	