

## INCOME

### W2 - Wages and Salaries

**\* We need your W2**

[IRS Topic 401](#)

### 1099R

**\* We need your 1099R**

You have 60 days to roll your distribution from one IRA to another IRA.

[IRS Topic 413](#)

Was this a rollover?

Y N

**2020 COVID Withdrawals - Please review Mailed Questionnaire**

Early distribution before age 59 1/2 incurs a 10% penalty in federal tax as well federal and state taxes

[IRS Topic 558](#)

The penalty may be waived for some of these reasons -

To pay for higher education expenses (tuition, fees, books, supplies, equipment, room and board. Must be 1/2 time.

First time homebuyer when you have not owned a home in the last 2 years and the maximum amount is \$10,000.

For an unemployed individual to pay for health insurance after leaving a job if you've received unemployment for

12 consecutive weeks. A self-employed individual qualifies. Expenses must be paid in the same year as distribution.

To pay for unreimbursed medical expenses that exceed 7.5% of AGI regardless of whether or not you itemize.

Due to total and permanent disability

Made to an alternate payee under a qualified domestic relations order. Does not apply to IRAs.

Required Minimum Distribution from your IRA must be taken at age 72

### SOCIAL SECURITY

**\* We need your 1099-SSA**

[Tax Topic 423](#)

If you had to pay back social security what is the total paid back \_\_\_\_\_

### INTEREST & DIVIDENDS

**\* We need your 1099-INT and 1099-DIV**

[Tax Topic 403](#)

[Tax Topic 404](#)

### STOCK SALES

**\* We need your 1099-B**

[Tax Topic 409](#)

For each stock sale we need the purchase date, price per share when purchased, # of shares, and total amount paid

For each stock sale we need the sale date, price per share when sold, # of shares and total amount received

### STATE TAX REFUNDS

**\* We need your 99G**

### UNEMPLOYMENT

**\* We need your 1099-G**

[Tax Topic 418](#)

### CANCELLATION OF DEBT

**\* We need your 1099C** Foreclosure, Short Sale on your Home, and Forgiveness of a Loan, Credit Card, etc.... [Tax Topic 431](#)

### GAMBLING WINNINGS

**\* We need your W-2G**

[Tax Topic 419](#)

Amount received in winnings \_\_\_\_\_

Amount spent on gambling \_\_\_\_\_

### ALIMONY

Amount received \_\_\_\_\_

Date Divorced: \_\_\_\_\_

### TAXABLE SCHOLARSHIPS

Amount received \_\_\_\_\_

[Tax Topic 421](#)

### JURY DUTY

Amount received not in your W-2 \_\_\_\_\_

If the amount is in your W-2 then how much did you receive? (Deduction) \_\_\_\_\_

### OTHER INCOME

Any other income received - bartering, side jobs, under the table money, illegal activity etc...? Y N

[Tax Topic 420](#)

### HEALTH SAVINGS ACCOUNT (HSA)

**\* We need your 1099-'HSA**

Did you take a distribution from a HSA that was more than the amount of your medical expenses? Y N

**QUALIFIED TUITION PROGRAM (QTP)**

Did you take a distribution from your ESA/QTP that was more than your education expense?    Y    N    [Tax Topic 313](#)

**DEDUCTIONS**

**RETIRED PUBLIC SAFETY OFFICER INSURANCE PREMIUMS**

Law enforcement officers, firefighters, ambulance crews, other public safety officers are eligible  
Amount paid for accident, health or long term care insurance directly from retirement check \_\_\_\_\_

**ALIMONY**

Paid to: (First Name and Last Name) \_\_\_\_\_ [Tax Topic 452](#)  
Social Security # \_\_\_\_\_  
Amount Paid \_\_\_\_\_  
Date of Divorce \_\_\_\_\_

**STUDENT LOAN INTEREST**

Amount of interest paid on student loan \_\_\_\_\_ [Tax Topic 456](#)

**EDUCATOR EXPENSES**

Amount paid for educational items & PPE as a teacher in a primary or secondary school \_\_\_\_\_ [Tax Topic 458](#)

**MOVING EXPENSES**

**Only members of the Armed Forces on active duty**

**Move is a military order & permanent change of station.**

Number of miles from OLD residence to NEW workplace \_\_\_\_\_ [Tax Topic 455](#)  
Number of miles from OLD residence to OLD workplace \_\_\_\_\_  
Amount for Transportation and storage of household good and personal effects \_\_\_\_\_  
Amount for travel and lodging expenses incurred during move \_\_\_\_\_  
Amount of moving expenses reimbursed by employer \_\_\_\_\_

Investment Interest (e.g. margin) \_\_\_\_\_