

INCOME		
W2 - Wages and Salaries		
* We need your W2		IRS Topic 401
1099R		
* We need your 1099R		IRS Topic 413
You have 60 days to roll your distribution from one IRA to another IRA.		
Was this a rollover?	Y N	
Did you withdraw retirement income in 2020 and spread the tax over three years?	Y N	
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) _____