

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.
Was this a rollover?

Y N

[IRS Topic 413](#)

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.

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 _____

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 expense? Y N

COVERDELL EDUCATION SAVINGS (ESA) OR 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 _____

STUDENT LOAN INTEREST

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

EDUCATOR EXPENSES

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

MOVING EXPENSES

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) _____