

## Personal Data

|  |  |
|--|--|
| Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separate <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widow(er) |  |
| Taxpayer Name  | SSN  |
| Spouse Name  | SSN  |
| Address  | Apt no.  |
| City   | State Zip  |
| Foreign State/Province   | Foreign Postal Code  |
| Foreign Country  |  |
| Taxpayer Date of Birth   | Spouse Date of Birth   |
| Occupation   | Occupation   |
| Daytime phone: Ext:  | Daytime phone: Ext:  |
| Evening phone: Ext:  | Evening phone: Ext:  |
| Cell:  | Cell:  |
| E-mail   | E-mail   |
| <input type="checkbox"/> Full time student <input type="checkbox"/> Blind  | <input type="checkbox"/> Full time student <input type="checkbox"/> Blind                        |
| Do you want \$3 to go to the Presidential Election Camp Fund? <input type="checkbox"/>   | Does your spouse want \$3 to go to the Presidential Election Camp Fund? <input type="checkbox"/> |
| Date and time of this year's appointment   |  |

### Income Taxes Paid

| <b>Federal</b>              | 2014 estimate date due | 2014 estimated amount | Amount paid | Date paid | Check no. |
|-----------------------------|------------------------|-----------------------|-------------|-----------|-----------|
| 2013 Refund                 | April 17, 2014         |                       |             |           |           |
| 2013 Refund applied to 2014 | June 15, 2014          |                       |             |           |           |
| 2013 Balance Due            | Sept. 15, 2014         |                       |             |           |           |
|                             | Jan. 15, 2015          |                       |             |           |           |
| Amount paid                 | Date paid              | Check no.             | Amount paid | Date paid | Check no. |
| Additional payments made    |                        |                       |             |           |           |

| <b>Resident State</b>       | 2014 estimate date due | 2014 estimated amount | Amount paid | Date paid | Check no. |
|-----------------------------|------------------------|-----------------------|-------------|-----------|-----------|
| 2013 Refund                 | April 17, 2014         |                       |             |           |           |
| 2013 Refund applied to 2014 | June 15, 2014          |                       |             |           |           |
| 2013 Balance Due            | Sept. 17, 2014         |                       |             |           |           |
|                             | Jan. 15, 2015          |                       |             |           |           |
| Amount paid                 | Date paid              | Check no.             | Amount paid | Date paid | Check no. |
| Additional payments made    |                        |                       |             |           |           |

| <b>Local</b>                | 2014 estimate date due | 2014 estimated amount | Amount paid | Date paid | Check no. |
|-----------------------------|------------------------|-----------------------|-------------|-----------|-----------|
| 2013 Refund                 | April 17, 2014         |                       |             |           |           |
| 2013 Refund applied to 2014 | June 15, 2014          |                       |             |           |           |
| 2013 Balance Due            | Sept. 17, 2014         |                       |             |           |           |
|                             | Jan. 15, 2015          |                       |             |           |           |
| Amount paid                 | Date paid              | Check no.             | Amount paid | Date paid | Check no. |
| Additional payments made    |                        |                       |             |           |           |

# Wages and Salaries

Please attach all W-2(s).

**Name:**

**SSN:**

|    |  |                  |      |              |      |  |             |      |  |      |
|----|--|------------------|------|--------------|------|--|-------------|------|--|------|
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |
| TS |  | Federal I.D. No. |      | Company Name |      |  |             |      |  |      |
|    |  | State I.D. No.   |      |              |      |  |             |      |  |      |
|    |  |                  |      |              |      |  |             |      |  |      |
|    |  | Federal wages    | 2014 |              | 2013 |  | Federal tax | 2014 |  | 2013 |
|    |  | State wages      | 2014 |              | 2013 |  | State tax   | 2014 |  | 2013 |
|    |  | Local wages      | 2014 |              | 2013 |  | Local tax   | 2014 |  | 2013 |
|    |  |                  |      |              |      |  |             |      |  |      |

# Interest Income

Please attach all 1099(s) relating to interest income.

Name:

SSN:

| TSJ | Name of payer (If seller financed mortgage enter SSN and address of payer) | Interest Income | Federal Income Tax Withheld | Foreign Tax Paid | Tax Exempt Interest | Amount of Resident State Municipal Interest | Nominee Interest |
|-----|--|-----------------|-----------------------------|------------------|---------------------|---|------------------|
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |
|     |  |                 |                             |                  |                     |   |                  |

Did you have a financial interest in or signature authority over a financial account located in a foreign country?  Yes  No

## Itemized Deductions

|   |      |             |             |   |             |             |
|---|------|-------------|-------------|---|-------------|-------------|
| <b>Name:</b>  |      | <b>SSN:</b> |             |   |             |             |
| <b>MEDICAL and DENTAL</b>                                       |      | <b>2014</b> | <b>2013</b> | <b>GIFTS TO CHARITY (attach receipts)</b> | <b>2014</b> | <b>2013</b> |
| Health insurance premiums                                       |      |             |             | Total gifts by cash or check              |             |             |
| Long term care premiums   | Age: |             |             | 30% limitation                            |             |             |
| Long term care premiums   | Age: |             |             | Charitable miles                          |             |             |
| Number of medical miles   |      |             |             | Other than by cash or check               |             |             |
| Other medical and dental expenses (list):                       |      |             |             | Carryover from prior year subject to:     |             |             |
|   |      |             |             | QCC - qualified farmer or rancher         |             |             |
|   |      |             |             | QCC - non-qualified farmer or rancher     |             |             |
|   |      |             |             | 50% limitation                            |             |             |
|   |      |             |             | 30% limitation                            |             |             |
|   |      |             |             | 30% limitation capital gain property      |             |             |
|   |      |             |             | 20% limitation                            |             |             |
| <b>TAXES YOU PAID</b>   |      |             |             | <b>JOB EXPENSES (list):</b>               |             |             |
| State and local income taxes                                    |      |             |             | Unreimbursed employee expenses            |             |             |
| Sales tax   |      |             |             |   |             |             |
| Real estate taxes   |      |             |             |   |             |             |
| Taxes that qualify for State Property Tax Credit                |      |             |             |   |             |             |
| Personal property taxes   |      |             |             |   |             |             |
| Other taxes (list):   |      |             |             |   |             |             |
|   |      |             |             |   |             |             |
|   |      |             |             |   |             |             |
| <b>INTEREST YOU PAID</b>  |      |             |             |   |             |             |
| Home mortgage interest and points on Form 1098                  |      |             |             |   |             |             |
| Home mortgage interest not on Form 1098                         |      |             |             | Tax preparation fees                      |             |             |
| SSN/EIN:  |      |             |             | Other Expense (list):                     |             |             |
| Name:   |      |             |             |   |             |             |
| Street:   |      |             |             |   |             |             |
| City:   |      |             |             |   |             |             |
| <b>U.S. Only</b><br>State, ZIP                                  |      |             |             |   |             |             |
| <b>Foreign Only</b><br>Province/State, Country, Postal Code     |      |             |             | <b>MISCELLANEOUS DEDUCTIONS</b>           |             |             |
|   |      |             |             | Other deductions not subject to 2% limit  |             |             |
| Portion of mortgage interest above that is home equity interest |      |             |             |   |             |             |
| Points not reported on Form 1098                                |      |             |             |   |             |             |
| Qualified mortgage insurance premiums                           |      |             |             |   |             |             |
| Investment interest   |      |             |             |   |             |             |
|   |      |             |             |   |             |             |
|   |      |             |             |   |             |             |