

Tax Associates, Inc.

Client Worksheet

Please complete and bring with to your appointment

Medical Expenses

Health Insurance _____ \$ _____
Clinic _____ \$ _____
Hospital _____ \$ _____
Doctor _____ \$ _____
Doctor (eye) _____ \$ _____

(These expenses must exceed
10% of income)

Property Taxes

Residence _____ \$ _____
Second Home/ Cabin _____ \$ _____

Tabs

Vehicle Tabs _____ \$ _____

Mortgage Interest Expense

Home Mortgage _____ \$ _____
Second Home/ Cabin _____ \$ _____

Mortgage Insurance/ PMI

Home Mortgage Insurance__ \$ _____

***If you refinanced your home
Bring your closing statement.

Charitable Donations

Cash _____ \$ _____
Non Cash _____ \$ _____

Miscellaneous

Tax Service Fees _____ \$ _____
Union Dues _____ \$ _____
Work Uniforms _____ \$ _____
Work Tools _____ \$ _____

(These expenses must exceed
2% of income)

If any of the following apply, please
check and we will go over it with
you during your appointment.

___ Casualty or Theft Loss
___ Moving Expense
___ Sale or Purchase of Home
___ Child Care Expenses
___ HSA Contributions/Disbursements
___ IRA Contributions/Disbursements

***For college expenses remember to
bring your 1098T from the college.

We hope this worksheet helps you get your documents together. Keep in mind this list is general and not all items may apply to your return.

Don't wait until the last minute to schedule your appointment, as we get extremely busy towards the end of the tax season. If you prefer to drop off your information at our office, please feel free to do so at any time.