

# CLIENT WORKSHEET

Please complete & bring with your appointment

**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

*\*\* If 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.

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## 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 \$ \_\_\_\_\_

## CHARITABLE DONATIONS

Cash \$ \_\_\_\_\_  
Non Cash \$ \_\_\_\_\_

## MORTGAGE INSURANCE/ PMI

Home Mortgage Insurance \$ \_\_\_\_\_

## MORTGAGE INTEREST EXPENSE

Home Mortgage \$ \_\_\_\_\_  
Second Home/Cabin \$ \_\_\_\_\_

*\*\* If you refinanced your home, bring your closing statement.*

## MISCELLANEOUS

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

*(These expenses must exceed 2% of income)*