

<b>NAMES</b> as listed on Social Security Card		<b>Date of Birth</b>	<b>Social Security #</b>	<b>Occupation</b>	<b>Filing Status:</b>	
Taxpayer					<input type="checkbox"/>	Single
Spouse					<input type="checkbox"/>	Married Filing Jointly
Address					<input type="checkbox"/>	Married Filing Separately
Phone					<input type="checkbox"/>	Head of Household
					<input type="checkbox"/>	Widow(er) with dependent
<b>Mail Check</b> ___ <b>or Direct Deposit Account #</b> _____ <b>Bank RT#</b> _____ <b>Checking</b> ___ <b>or Savings</b> ___						

<b>DEPENDENTS</b> – List names of all dependents who received more than half of their support from you.					Months in your home in 2019	Full Time Student 5 months or more?
Name of Dependents	Date of Birth	Relationship	Social Security #			

<b>WAGE INCOME</b> - Please bring all W-2 Forms provided by your employer(s).							Retirement (401K)	Taxpayer or Spouse
Employer	State	Gross wages	Federal w/h	SS w/h	Med w/h		State w/h	

<b>RETIREMENT INCOME</b> - Please bring all 1099-R Forms provided.						Do you receive VA disability benefits? Y___ N___		Taxpayer or Spouse
Name of Payer	Gross diistribution	Taxable distribution	code	Federal w/h	State w/h	State		

<b>SOCIAL SECURITY</b> - Please bring all 1099-SSA Forms					Taxpayer or Spouse
Net Benefits (box 5)	Medicare Premiums paid	Federal w/h	Adjustments / Repayments		

<b>INTEREST INCOME</b> - Please bring all 1099-INT Forms you received			
Name of Payer	Savings Bonds/Federal Obligations	Amount Reported	federal withholding

<b>DIVIDEND INCOME</b> - Please bring all 1099 Forms you received					
Name of Payer	Ordinary dividends	Qualified dividends	Capital gain distr.	Other	federal withholding

<b>OTHER INCOME</b> – Please bring all 1099 Forms and Schedule K-1's		Amount	federal withholding
Unemployment Compensation			
Prizes and Awards			
Alimony Received			
Tax Refunds (State and Local)			
Commissions and Fees			
Other			

**STOCK OR PROPERTY SALES** —Please bring broker statements. Form 1099-B, or Real Estate transaction papers.

Name of Stock or Property Description	Number of Shares	Date Acquired	Date Sold	Sales Price	Cost or Other Basis	Expense of Sale	Depreciation or Depletion

**RENTAL AND ROYALTY INCOME AND DEDUCTIONS**

	Property A	Property B	Property C	Property D
Type of Property				
Property Location				
Rental Income				
Royalty Income				
Advertising				
Auto and Travel				
Cleaning and Maintenance				
Commissions				
Insurance				
Professional Fees				
Management Fees				
Mortgage Interest Paid				
Other Interest				
Repairs				
Supplies				
Taxes				
Utilities				
Depreciation (discuss with tax consultant)				
Other				

**BUSINESS OR FARM INCOME AND EXPENSES** Business name \_\_\_\_\_ EIN \_\_\_\_\_

INCOME description	Amount

EXPENSES	Amount	Amount
Advertising		Veterinary Fees, Medicine
Cell Phone		Legal and Professional Services
Car and Truck Expenses (mileage record required)		Office Expenses
Commissions		Pension / Profit Sharing Plans
Depletion		Interest:
Depreciation (discuss with tax consultant)		Bank Loans
Employee Benefit Program		Credit Cards
Insurance		Vehicle Loans
Chemicals		Other
Conservation Expenses		Other
Custom Hire		Rent or Lease:
Feed Purchased		Machinery & Equipment
Fertilizers and Lime		Other (Land, Animals, etc.)
Freight, Trucking		Other Business Property
Gasoline, Fuel, Oil		Other
Supplies		Cost of Goods Sold:
Travel		Inventory (Beginning of Year)
Entertainment & Meals		Purchases of Goods
Utilities & Telephone		Inventory (End of Year)
Wages		Other Expenses:
Repairs, Maintenance		
Seed, Plants Purchased		
Storage, Warehousing		

**COLLEGE TUITION** bring Form 1098T issued by the school

Name of Student	School name, state & county	Year in school	Amount of tuition & required fees paid to college	books, required equipment
		Fr So Jr Sr Other	\$	\$
		Fr So Jr Sr Other	\$	\$
		Fr So Jr Sr Other	\$	\$
		Fr So Jr Sr Other	\$	\$

**DEDUCTIONS – MISCELLANEOUS**

Amount

Alimony Paid (list recipient's name and SSN)	
CD or Savings Penalty for Premature Withdrawal	
Job search expenses	
Teachers – Classroom Supplies and Expenses	
Unreimbursed Employee Expenses: Tools, Uniforms, Subscriptions to Professional Journals	
Union & Professional Dues	
Mileage between job sites	
Tax Return Preparation Fees or Legal Fees (if legal fees you paid for is related to taxes or producing taxable income)	
Investment Expenses	
Safe Deposit Box	

**DEDUCTIONS – MEDICAL AND DENTAL EXPENSES**

Unreimbursed Amount

Taxpayer

Spouse

Prescription Drugs and Insulin			
Doctors and Dentists			
Hospitals			
Nursing Home			
Insurance Premiums you Paid for Medical, Dental Vision coverage (not thru payroll or SSA deduction)			
Long Term Care Insurance			
Transportation Expense or Vehicle Miles for Medical Purposes			
Other (List below - including hearing aids, dentures, eyeglasses, braces, wheelchairs, etc.)			

**HEALTH SAVINGS ACCOUNT**

Amount

HSA contributions made (from after-tax \$\$ - not through payroll)		
HAS distributions taken (reported on Form 1099-SA)		

**DEDUCTIONS – INTEREST**

Amount

Home Mortgage Interest paid to Financial Institutions (Form 1098)	
Home Mortgage Interest paid to Individuals (show name, address and social sec. number)	
Interest on 2 <sup>nd</sup> home (include RV or Boat if living accommodations are built in)	
Investment Interest	
Principal Mortgage Insurance (PMI)	

**DEDUCTIONS – TAX PAID in 2019**

Amount

Real Estate Tax paid	
Personal Property Tax paid	
State income tax paid in 2018 for prior year tax return	
Sales Tax paid on large items: cars, boats, RV	

**RESIDENTIAL ENERGY CREDITS**

<https://www.energystar.gov/>

Type of EnergyStar qualified improvement (windows, doors, insulation, air conditioner, furnace, solar panels, etc.)

Purchase Amount

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**CHILD & DEPENDENT CARE**

Child's name

Qualifying Care Provider's Name

Provider's Address

Provider's ID#

Amount


**IRA/SEP Contributions**

Date	Roth or Traditional	Taxpayer Amount	Spouse Amount

**Roth IRA Conversions to Traditional IRA**

Date	Transferred from:	Transferred to:	Amount	Taxpayer Or Spouse

**Estimated Taxes Paid & 2018 Refunds Credited to 2019**

Federal		State	
Date Paid	Amount	Date Paid	Amount

Did you claim a \$7,500 first-time homebuyer credit on your 2008 return? Yes \_\_\_ No \_\_\_  
 Have you repaid more than the required annual \$ 500.00 amount? Yes \_\_\_ \$ \_\_\_\_\_ No \_\_\_

**DEDUCTIONS – CONTRIBUTIONS** details may be required – receipts must be available in case of audit

Cash – name of charity	Amount	Non-Cash - name of charity & description of item(s)	Date	Amount

If you received Health Insurance through the Marketplace / Healthcare.gov bring your Form 1095-A  
 If you received Health Insurance through your Employer bring your Form 1095-C

Salvation Army Valuation Guide [www.salvationarmyusa.org](http://www.salvationarmyusa.org)

LADIES' CLOTHING	low range	high range
blouse	\$2.50	\$12.00
bathrobes	\$2.50	\$12.00
boots	\$2.00	\$5.00
bathing suits	\$4.00	\$12.00
coats	\$10.00	\$40.00
dresses	\$4.00	\$20.00
evening dresses	\$10.00	\$60.00
fur hats	\$7.00	\$15.00
fur coats	\$25.00	\$400.00
handbags	\$2.00	\$20.00
hats	\$1.00	\$8.00
jackets	\$4.00	\$12.00
nightgowns	\$4.00	\$12.00
pant suits	\$6.50	\$25.00
socks	\$0.50	\$1.25
suits	\$6.00	\$25.00
shoes	\$2.00	\$25.00
skirts	\$3.00	\$8.00
sweaters	\$3.75	\$15.00
slips	\$1.00	\$6.00
slacks	\$3.50	\$12.00
MEN'S CLOTHING	low range	high range
jackets	\$7.50	\$25.00
over coats	\$15.00	\$60.00
pajamas	\$2.00	\$8.00
pants - shorts	\$3.50	\$10.00
raincoats	\$5.00	\$20.00
suits	\$15.00	\$60.00
slacks	\$5.00	\$12.00
shirts	\$2.50	\$12.00
sweaters	\$2.50	\$12.00
shoes	\$4.20	\$30.00
swim trunks	\$2.50	\$8.00
tuxedo	\$10.00	\$60.00
under-shirts	\$1.00	\$3.00
belts - ties	\$1.00	\$8.00
SPORTING GOODS	low range	high range
bicycles	\$5.00	\$75.00
fishing rods	\$6.00	\$30.00
golf clubs	\$2.00	\$25.00
ice / roller skates	\$3.00	\$15.00
luggage	\$5.00	\$15.00
skis	\$15.00	\$100.00
sleds	\$6.00	\$24.00
tennis rackets	\$5.00	\$40.00

FURNITURE	low range	high range
air conditioner	\$20.00	\$90.00
bar stools	\$12.00	\$24.00
bed full, queen, king complete	\$50.00	\$170.00
bed (single) complete	\$35.00	\$100.00
bedroom set complete	\$250.00	\$1,000.00
bicycles	\$15.00	\$75.00
chest	\$25.00	\$95.00
china cabinet	\$85.00	\$300.00
convertible sofa (w/ mattress)	\$50.00	\$300.00
crib (w/ mattress)	\$25.00	\$100.00
chair (upholstered)	\$25.00	\$100.00
coffee table	\$15.00	\$65.00
dresser w/ mirror	\$20.00	\$100.00
desk	\$25.00	\$140.00
dryer	\$45.00	\$90.00
electric stove (working)	\$75.00	\$150.00
end tables (2)	\$10.00	\$50.00
lamp	\$5.00	\$50.00
fireplace set	\$15.00	\$60.00
floor lamps	\$6.00	\$55.00
folding beds	\$20.00	\$60.00
gas stoves	\$50.00	\$125.00
heaters	\$7.50	\$22.00
high chair	\$12.00	\$60.00
kitchen table	\$25.00	\$70.00
kitchen cabinets	\$25.00	\$75.00
kitchen chair	\$2.50	\$10.00
kitchen set	\$35.00	\$170.00
mattress (double)	\$7.00	\$30.00
mattress (single)	\$5.00	\$20.00
microwave	\$10.00	\$50.00
piano	\$3.00	\$240.00
pictures and paintings	\$6.00	\$48.00
ping pong tables	\$18.00	\$48.00
pool tables	\$24.00	\$90.00
rugs	\$4.00	\$108.00
refrigerator (working)	\$90.00	\$300.00
pool tables	\$24.00	\$90.00
sofa	\$35.00	\$200.00
stroller	\$6.00	\$50.00
TV color (working)	\$75.00	\$225.00
trunk	\$5.00	\$70.00
wardrobe	\$20.00	\$100.00
washer (working)	\$40.00	\$150.00

CHILDREN'S CLOTHING	low range	high range
blouses	\$2.00	\$8.00
boots	\$3.00	\$20.00
coats	\$4.50	\$20.00
dresses	\$3.50	\$12.00
jackets	\$3.00	\$25.00
jeans	\$3.50	\$12.00
pants	\$2.50	\$12.00
snowsuits	\$4.00	\$19.00
shoes	\$2.50	\$8.75
skirts	\$1.50	\$6.00
sweaters	\$2.50	\$8.00
slacks	\$2.00	\$8.00
shirts	\$2.00	\$6.00
socks	\$0.50	\$1.50
Miscellaneous	low range	high range
adding machines	\$5.00	\$50.00
bedspread/quilt	\$3.00	\$24.00
Christmas trees	\$18.00	\$60.00
home computer	\$180.00	\$600.00
mixer	\$5.00	\$20.00
mower	\$12.00	\$120.00
power edger	\$6.00	\$60.00
rototiller	\$30.00	\$108.00
sewing machine	\$18.00	\$90.00
snow blower	\$60.00	\$180.00
vacuum cleaner (working)	\$24.00	\$72.00
wigs	\$6.00	\$30.00
DRY GOODS	low range	high range
bakeware	\$1.00	\$3.00
blankets	\$3.00	\$15.00
chair covers	\$5.00	\$30.00
curtains	\$1.50	\$12.00
drapes	\$6.50	\$40.00
pillows	\$2.00	\$8.00
sheets	\$2.00	\$8.00
throw rugs	\$1.50	\$12.00
towels	\$0.50	\$4.00

All donations must be in good or better condition.

The table includes low and high estimates of value. Consider your item's relative age and quality.

Keep your receipt with your tax return copies.