

Dependent Data

#1	#2	#3
First Name:	First Name:	First Name:
Last Name:	Last Name:	Last Name:
SSN:	SSN:	SSN:
Relationship:	Relationship:	Relationship:
Months Lived with you last year:	Months Lived with you last year:	Months Lived with you last year:
Date of Birth(MM/DD/YY):	Date of Birth(MM/DD/YY):	Date of Birth(MM/DD/YY):

Daycare Provider Data

Provider Name:	Provider SSN or EIN:	
Provider Address:		
City:	State:	Zip:
Amount Paid:		
Amount Reimbursed by an Employer Dependent Care Plan:		

Education Expenses

#1	#2	#3
Student Name:	Student Name:	Student Name:
Name of Institution:	Name of Institution:	Name of Institution:
Grade/Year in College:	Grade/Year in College:	Grade/Year in College:

Type of Expense: (ex. Tuition, School Supplies, Computer Hardware, Musical Instruments, etc.)	Amount	Allocated to which student
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Income Information

*Check all that apply.

- | | |
|--|---|
| <input type="checkbox"/> W-2 (wages) | <input type="checkbox"/> 1099-INT (Interest) |
| <input type="checkbox"/> 1099-DIV (Dividends) | <input type="checkbox"/> 1099-B (Sale of Securities) |
| <input type="checkbox"/> 1099-R (Retirement Plan) | <input type="checkbox"/> 1099-G (Unemployment/State Refunds) |
| <input type="checkbox"/> 1099-S (Real Estate Sales) | <input type="checkbox"/> 1099-K (Third Party Network Payments) |
| <input type="checkbox"/> SSA-1099 (Social Security) | <input type="checkbox"/> 1099-Misc (Rents/Royalties/Prizes/etc) |
| <input type="checkbox"/> Schedule K-1 (Partnership/Corps/trusts) | <input type="checkbox"/> 1099-A or C (Cancellation of Debt) |
| <input type="checkbox"/> 1099-Q Education Savings Account | <input type="checkbox"/> W-2G (Gambling/Lottery Winnings) |
| <input type="checkbox"/> Veterans Pension or Disability | <input type="checkbox"/> Workers Compensation |
| <input type="checkbox"/> RRB-1099 (Railroad Retirement) | <input type="checkbox"/> HSA Distribution |
| <input type="checkbox"/> Bonus and Prizes not on W-2s | <input type="checkbox"/> Jury Duty Pay |
| <input type="checkbox"/> Alimony Received | <input type="checkbox"/> Foreign Trust |
| <input type="checkbox"/> COBRA Health Insurance Assistance | |

Expense Information

*Check all that apply.

- | | |
|--|---|
| <input type="checkbox"/> 1098 Mortgage Interest Statement | <input type="checkbox"/> 1098-E Student Loan Interest Statement |
| <input type="checkbox"/> 1098-T Tuition Statement | <input type="checkbox"/> Medical Expenses |
| <input type="checkbox"/> Cost Basis of Securities Sold | <input type="checkbox"/> State Taxes Paid |
| <input type="checkbox"/> Alimony paid | <input type="checkbox"/> IRA Contributions |
| <input type="checkbox"/> Moving Expenses | <input type="checkbox"/> HSA Contributions |
| <input type="checkbox"/> Real Estate Taxes Paid | <input type="checkbox"/> Personal Property Taxes (car tabs etc) |
| <input type="checkbox"/> Sales Taxes Paid | <input type="checkbox"/> Estimated Taxes Paid |
| <input type="checkbox"/> Casualty Losses (storm, fire, theft etc) | <input type="checkbox"/> Unreimbursed Employee Expenses |
| <input type="checkbox"/> Investment Expenses | <input type="checkbox"/> Gambling Losses (limited to winnings) |
| <input type="checkbox"/> Sold Home: Cost of Home and Cost of Improvements to your home | |
| <input type="checkbox"/> Sold, Purchased, Refinanced Home: Settlement Statement | |
| <input type="checkbox"/> Energy Efficient Home Improvements | |
| <input type="checkbox"/> Charitable Contributions | |
| <input type="checkbox"/> If you are a Teacher: Out of Pocket Classroom Expenses | |