



J&J Taxes & More

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Name: _____
Birthdate: _____
Social Security #: _____
Phone: _____
E-mail: _____

Spouse: _____
Birthdate: _____
Social Security #: _____
Phone: _____
E-mail: _____

Address: _____
City: _____ State: _____ Zip: _____

Dependents You Supported 50% or more

Social Security #

Birthdate

Months in Home

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income Sources

W2's (from work)
1099-NEC (self-employment)
1099-R (pension's, IRS's, investments)
1099-INT (interest)
1099-DIV (dividends)
1099-B (stock sales)
Unemployment
Social Security
1099-G (gambling winnings)
1099-K (selling income)
K-1 (investment)
1099-C (cancelled debt)

Possible Deductions

Daycare expenses (need name, address & ein)
1099-T (tuition statement)
Additional education expenses (books, materials)
1099-A (healthcare)
HSA (statement)
Mortgage statements (if itemizing)
Charity (if itemizing)
Property Tax Statement
Gambling Losses (no more than winnings)
Medical Expenses (must itemize and 7.5% of income)
Student Loan Statement (paid)
Electric vehicle purchase? (made in North America)

Contribution to an IRA?

Buy, Sell, Hold Virtual Currency? (Yes or No)

Residential Energy Credits: (new furnace, new air conditioner, hot water tank, storm doors/windows, insulation)

Direct Deposit any refund?

Direct Debit any balance due? date of withdraw: _____

Bank Account #: _____

Routing #: _____