

## Personal Data (page 2)

Your Name \_\_\_\_\_ SSN \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ SSN \_\_\_\_\_

### Itemized Deductions

To itemize deductions, bring receipts and documentation for these types of expenses:

#### Medical

Prescription drugs \$ \_\_\_\_\_  
 Health ins. premiums \$ \_\_\_\_\_  
 Medicare premiums \$ \_\_\_\_\_  
 Dental ins. premiums \$ \_\_\_\_\_  
 Doctors \$ \_\_\_\_\_  
 Medical mileage \$ \_\_\_\_\_  
 Lab and X-ray \$ \_\_\_\_\_  
 Glasses, hearing aids \$ \_\_\_\_\_

#### Contributions

Church \$ \_\_\_\_\_  
 United Way \$ \_\_\_\_\_  
 Heart/Cancer \$ \_\_\_\_\_  
 Clothing, furniture, etc. \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

#### Miscellaneous

Union dues \$ \_\_\_\_\_  
 Tax prep fees \$ \_\_\_\_\_  
 Educational expenses \$ \_\_\_\_\_  
 Job seeking costs \$ \_\_\_\_\_  
 Investment expense \$ \_\_\_\_\_  
 Professional licenses \$ \_\_\_\_\_  
 Trade /prof. journals \$ \_\_\_\_\_  
 Safe deposit box \$ \_\_\_\_\_  
 Safe equipment \$ \_\_\_\_\_  
 Work tools \$ \_\_\_\_\_  
 Business telephone \$ \_\_\_\_\_  
 Uniforms and laundry \$ \_\_\_\_\_  
 Professional societies \$ \_\_\_\_\_  
 Business mileage \$ \_\_\_\_\_  
 Alimony payments \$ \_\_\_\_\_  
 Lottery/Gambling \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

#### Taxes

Real estate taxes \$ \_\_\_\_\_  
 Other property taxes \$ \_\_\_\_\_  
 Boat property taxes \$ \_\_\_\_\_  
 Auto excise tax \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

#### Interest Paid

Home mortgage, 1<sup>st</sup> \$ \_\_\_\_\_  
 Home mortgage, 2<sup>nd</sup> \$ \_\_\_\_\_  
 Name \_\_\_\_\_ \$ \_\_\_\_\_  
 Address \_\_\_\_\_ \$ \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_ \$ \_\_\_\_\_

### Refund

You may receive your federal and state tax refund through the following:

Check only one box.

1.  U.S. Mail (approximately 3 weeks)
2.  RT (Refund Transfer Less Tax Preparation and Bank Fees) Receive refund within 10 days
3.  RAL (**Refund Anticipation Loan** Less Tax Preparation and Bank Fees) Receive refund in 1 to 2 days
4.  Direct Deposit (Safely deposited into your checking or savings account within 10 days)

#### 4. Direct Deposit Information

Account \_\_\_\_\_ Federal deposit amount \_\_\_\_\_

Deposit selection: Federal selection  State/City selection  State deposit amount \_\_\_\_\_

Name of financial institution	Routing Number	Account number	Type of account
			Checking <input type="checkbox"/> Savings <input type="checkbox"/>