

**Tax Record Worksheet for** \_\_\_\_\_

**Year:** \_\_\_\_\_

Please provide us with all your tax documents including Forms W-2, 1099, 1098, K-1, 1095, etc.  
 This worksheet contains deductions and other information that might provide a tax benefit on your return.

Federal Estimated Tax Paid			State Estimated Tax Paid			Education Expenses	
	<u>Amount</u>	<u>Date Paid</u>		<u>Amount</u>	<u>Date Paid</u>		<u>Form 1098-T</u>
Due 4/15	_____	_____	Due 4/15	_____	_____	Tuition & Fees	_____
Due 6/15	_____	_____	Due 6/15	_____	_____	Books	_____
Due 9/15	_____	_____	Due 9/15	_____	_____	Other (list): _____	_____
Due 1/15	_____	_____	Due 1/15	_____	_____	_____	_____

**ITEMIZED DEDUCTIONS**

The main itemized deductions are home mortgage interest, state/local taxes (including property taxes), charitable donations, and medical expenses (if more than 7.5% of income). Itemized Deductions will benefit you on your federal or state tax return, if they are more than the standard deduction.

\* The federal standard deduction is \$12,950 if you file Single, \$25,900 if you file married, and \$19,400 if you file Head of Household.

\* In California, the standard deduction is \$4,803 if you file Single and \$9,606 if you file Married or Head of Household.

HEALTH CARE	TAXES PAID	MISCELLANEOUS
<i>Deductible if more than 7.5% of your income.</i>		<i>Deductible if more than 2% of your income.</i>
<b>Health/Dental Insurance</b> _____	<b>Property Taxes</b> _____	<b>Gambling Losses</b> _____
<b>Doctor/Dental Bills</b> _____	<b>Vehicle Registration</b> _____ <i>A portion of vehicle registration is deductible. In CA, the <u>vehicle license fee</u> is deductible. You can lookup your VLF at <a href="http://dmv.ca.gov/wasapp/FeeCalculatorWeb/vlfform.do">dmv.ca.gov/wasapp/FeeCalculatorWeb/vlfform.do</a></i>	<i>Deductible only if offsetting gambling winnings.</i>
<b>Prescriptions</b> _____	<b>Sales Tax on Major Purchase(s)</b> _____	<u>Deductible on State return only</u>
<b>Medical Mileage</b> _____	<i>Sales Tax on major purchases, such as a car or boat</i>	<b>Income Tax Prep</b> _____
<b>Other (list):</b> _____		<b>Safe Deposit Box</b> _____
		<b>Job Expenses (not reimbursed):</b>

**CHARITABLE DONATIONS**

Cash/Check Donations	Charitable Mileage		
_____	_____		
<b>Non-Cash/Item Donations (Please List)</b>			
<u>Date</u>	<u>Description</u>	<u>Donee Organization</u>	<u>FMV (Value)</u>
_____	_____	_____	_____
_____	_____	_____	_____

**Notes for Preparer:**

\_\_\_\_\_

\_\_\_\_\_

<b>Union Dues</b>	_____
<b>Professional Memberships</b>	_____
<b>Subscriptions</b>	_____
<b>Licenses &amp; Certifications</b>	_____
<b>Tools (Work Related)</b>	_____
<b>Safety Equipment</b>	_____
<b>Job Supplies</b>	_____
<b>Uniforms (cost)</b>	_____
<b>Uniforms (cleaning)</b>	_____
<b>Travel</b>	_____
<b>Meals (away from home)</b>	_____
<b>Education (Improve Job)</b>	_____

*\*For more information about deducting your personal auto or a home office as job expenses, visit [www.prospecttax.com/taxdocs](http://www.prospecttax.com/taxdocs)*

**Claiming Child related Tax credits?** For taxpayers who claim child related tax credits, we are required to 'verify' that the dependents on your return are actually your dependents and reside in your home. Please provide one of the following documents that includes the name and address of your dependents (their address must match your address):

- \* Form 1095 (Health Insurance Tax Form)
- \* Statement from Medical Provider (for example, name of dependent on a prescription order)
- \* Statement from School or Daycare Provider
- \* Social Security Administration document
- \* Other document showing name and address of your dependent(s)

**If you have questions, please contact our office. (909) 797-3140**

**Child Care Expense**

Provider's Name	Provider's Address	Provider's Phone Number	EIN/SSN	Amount Paid
_____	_____	_____	_____	_____

**Have a small business or received a 1099?**  
 Visit [www.prospecttax.com](http://www.prospecttax.com) and click "Sole Proprietors" under the 'Client Resources' menu.

**Do you have rental real estate?**  
 Visit [www.prospecttax.com](http://www.prospecttax.com) and click "Rental Properties" under the 'Client Resources' menu.