

INCOME

T/S/J Code: T -- Taxpayer S -- Spouse J -- Joint Use these codes if married filing jointly

W-2 FORMS

| T/S | Name of Employer | Taxable Wages | Withheld Fed. Tax | Other Taxes Withheld | | | |
|-----|------------------|---------------|-------------------|----------------------|----------|-------|-------|
| | | | | Soc. Sec. | Medicare | State | Local |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |
| | | \$ | \$ | | | | |

Please Attach W-2s

SOCIAL SECURITY

| | Benefits (from box 5) | Federal Tax Withheld |
|---|-----------------------|----------------------|
| IMPORTANT: Attach Form(s) SSA-1099 | Taxpayer | \$ |
| | Spouse | \$ |

MISCELLANEOUS INCOME

Please Attach Relevant Forms

(Show Losses in Brackets)

| T/S/J | Source of Income | Amount |
|-------|--|--------|
| | Alimony <i>Received</i> under <i>Pre-2019</i> Agreement (List Alimony <i>paid</i> in Misc. Deductions) | \$ |
| | Jury Duty (or other public service) | \$ |
| | Tips / Gratuities (not reported on W-2) | \$ |
| | Contest / Awards / Gambling Winnings | \$ |
| | Commissions / Bonuses (not reported on W-2) | \$ |
| | Pensions / Annuities | \$ |
| | IRA / Keogh | \$ |
| | Profit Sharing Distributions | \$ |
| | Unemployment Compensation | \$ |
| | Partnerships / Estates / Trusts | \$ |
| | Small Business Corporations / Sub Chapter S | \$ |
| | Business / Self-Employed (<i>attach Schedule C or details</i>) | \$ |
| | Farm (<i>attach Worksheet F or details</i>) | \$ |
| | Rental (<i>attach Worksheet E or details</i>) | \$ |
| | Forgiven Debt | \$ |
| | Other (explain): | \$ |

Please attach Form(s) 1099-MISC, W2G, or explain
 Please attach Form(s) 1099-NEC
 Please attach Form(s) 1099-R
 Please attach Form(s) 1099-R
 Please attach Form(s) 1099-R
 Please attach Form(s) 1099-G
 Attach Form(s) K-1
 Attach Form(s) K-1
 Place X in the box if you did NOT actively or materially participate in earning the income (or loss) listed

INTEREST INCOME

Use payer name listed on 1099-INT and attach

| T/S/J | Name of Payer | Interest Amount | Exempt | Code |
|-------|---------------|-----------------|--------|------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Please Attach 1099-INTs

DIVIDEND INCOME

Please attach all 1099-DIV forms

| T/S/J | Name of Payer | Total Ordinary Dividends | Qualified Dividends | Capital Gain Distributions | Non Taxable | X |
|-------|---------------|--------------------------|---------------------|----------------------------|-------------|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Please Attach 1099-DIVs

| CAPITAL GAINS AND LOSSES | | Stocks, Bonds and Mutual Funds (Attach Form 1099-B) Sale of Property and Real Estate (Attach Form 1099-S) | | | | |
|---|--|--|-------------------------|---------------|------------------|------|
| T/S/J | Description (e.g., # shares, name or stock symbol) | Date Acquired mm/dd/yyyy | Date Sold mm/dd/yyyy | Sale Price | Cost or Basis | Code |
| Please Attach Brokerage Statement, Form(s) 1099-B or 1099-S | | | | | | |

| SALE OF PERSONAL RESIDENCE | |
|--|--------------------------|
| Date Old Residence Acquired | Cost or Basis \$ |
| Improvements (additions, landscaping, driveway, new roof, etc.) | \$ |
| Date Old Residence Sold | Selling Price \$ |
| Expenses of Sale (commissions, legal fees, points, stamps, etc.) | \$ |
| 1. Was any part of residence rented or used for business? | Yes No |
| 2. Did you own and use the home as your principal residence for at least two of the last five years? | Yes No |
| 3. Have you rolled over a gain from the sale of a prior residence into the home sold? If so, please provide Form 2119 from the tax return for the year prior to when the home sold. | Yes No |
| 4. Was sale required due to job transfer, medical or unforeseen circumstance? | Yes No |
| Date New Residence Acquired (or construction began) | |
| Date of Occupancy | Cost of New Residence \$ |
| If married, do you and your spouse have the same proportionate interest in the new residence as in the old? | Yes No |
| Please attach copy of real estate closing papers for both the <u>purchase and sale</u> of your <u>old</u> home <u>and</u> the <u>purchase</u> of your <u>new</u> home. | |

| NON-TAXABLE INCOME | Important to list even if not taxable |
|---|---------------------------------------|
| Child Support / Payments / Assistance (not alimony) | \$ |
| Veterans Benefits / Disability Income | \$ |
| Workmen's Compensation / Loss of Time Payments | \$ |
| Other (Explain): | \$ |

| INCOME TAXES PAID OR REFUNDED | FEDERAL | STATE | LOCAL |
|---|---------|-------|-------|
| If someone else prepared your taxes last year, please provide a copy. | | | |
| Balance paid on last year's return (or prior years) | \$ | \$ | \$ |
| Refunds received from last year's return (or prior years) | \$ | \$ | \$ |

| ESTIMATED TAXES PAID | FEDERAL | STATE | LOCAL |
|---|------------------|-------|-------|
| If not paid by due dates, list actual dates paid. | 1st Quarter 4/15 | \$ | \$ |
| | 2nd Quarter 6/15 | \$ | \$ |
| | 3rd Quarter 9/15 | \$ | \$ |
| | 4th Quarter 1/15 | \$ | \$ |