

1208 EASTCHESTER DRIVE PO BOX 5145 HIGH POINT, NC 27262

		!	FULL LEGAL NAME		SOCIAL	SECURITY#	BIRTH DATE
YOURS:							
SPOUSE:							
DEPENDE	ENT 1:						
DEPENDE	ENT 2:						
DEPENDE	ENT 3:						
ADDRESS	S CITY 7	ID.					
						LIOME DUONE #	
EMAIL ADDRESS:				TAX YEAF	<b>,</b>	HOME PHONE #:	
YOUR OCCUPATION:				<u>IAX ILAI</u>	<u> </u>	YOUR CELL PHONE #:	
SPOUSE OCCUPATION:						SPOUSE CELL PHONE	E#
YES	<u>NO</u>	DURING TH	HE TAX YEAR, DID YOU		IF YES, F	PLEASE	
	1		TAX PAYMEN	ITS & REFU	IND IN	FORMATION	
		PAY ESTIM	IATED INCOME TAXES		ENTER [	DATE AND AMOUNT FOR	R FEDERAL AND STATE PAYMENTS
		WANT YOU	IR REFUND DIRECT DEPOSITED	)	ENTER F	ROUTING AND ACCOUNT	T NUMBER HERE
				INCOM	E		
		RECEIVE V	V-2 WAGES		ATTACH	FORMS W-2 FOR ALL W	/AGES EARNED DURING THE YEAR
		RECEIVE II	NTEREST OR DIVIDENDS		ATTACH	FORMS 1099 FOR ALL II	NTEREST OR DIVIDENDS EARNED
			SOCIAL SECURITY, DISABILITY, YMENT, OR RETIREMENT PLAN	BENEFITS	ATTACH	FORMS 1099 FOR ALL T	TAXABLE BENEFITS RECEIVED
		PAY OR RE	ECEIVE ALIMONY		ENTER A	AMOUNT HERE	
		SELL ANY	ASSETS, SUCH AS A HOME, LAN OR BONDS	ID,			E PURCHASE AND SELL, ND DATE OF PURCHASE
			NCOME FROM PARTNERSHIPS, ESTATES, OR TRUSTS		ATTACH	A SCHEDULE K-1 FROM	I EACH ENTITY
		RECEIVE S	SELF-EMPLOYED, RENTAL, OR F	ARM INCOME			EIVED AND DETAIL OF ALL AGE AND CELL PHONE USAGE)
			STATE TAX REFUNDS, GAMBLING Y PAY, PRIZES, OR ANY OTHER		ATTACH	DETAILS INCLUDING AN	MOUNTS

## **DEDUCTIONS**

	PAY MORTGAGE INTEREST ON YOUR HOME	ATTACH FORM 1098 FOR MORTGAGE INTEREST PAID				
	PAY PROPERTY TAX ON YOUR HOME	ENTER AMOUNT HERE				
	PAY PROPERTY TAX ON YOUR AUTOMOBILES , BOATS, OR OTHER PERSONAL PROPERTY	ENTER AMOUNT HERE				
	CONTRIBUTE CASH TO CHARITABLE ORGANIZATIONS	ENTER AMOUNT HERE				
	MAKE NONCASH CONTRIBUTIONS TO CHARITIES	ATTACH RECEIPTS WITH VALUE OF DONATIONS NOTED				
	PAY MEDICAL EXPENSES (INCLUDING HEALTH INSURANCE, COPAYS, DENTISTS, EYE DOCTORS, PRESCRIPIONS, ETC.) THAT EXCEED 7.5% OF YOUR TOTAL INCOME	ENTER TYPE AND AMOUNTS				
	HAVE GAMBLING LOSSES	ENTER AMOUNT HERE				
CREDITS & ADJUSTMENTS						
	PAY FOR CHILDCARE SO THAT YOU AND YOUR SPOUSE (IF APPLICABLE) COULD WORK	ATTACH THE CHILD CARE PROVIDERS YEAR END STATEMENT				
	PAY FOR HIGHER EDUCATION FOR YOURSELF, YOUR SPOUSE, OR DEPENDENTS	ATTACH FORM 1098-T				
	CONTRIBUTE TO AN IRA, SEP OR SIMPLE PLAN	ENTER TYPE AND AMOUNT HERE				
	PAY EDUCATOR EXPENSES	ENTER AMOUNT HERE				
	PAY STUDENT LOAN INTEREST	ENTER AMOUNT HERE				

ENTER CHANGES IN TAX SITUATION, QUESTIONS, OR MATTERS WE NEED TO DISCUSS HERE: