



(512) 693-7364
shelia@austinareatax.com
www.austinareatax.com

Personal Data

	Taxpayer	Spouse
Last Name		
First Name & Initial		
Social Security Number		
Occupation		
Phone		
Data of Birth		
Mailing Address		
City, State, Zip		
Email Address		
Bank routing and account numbers		
Health Insurance Coverage*		

*Was everyone on the tax return covered by health insurance all of 2015? If not, for which months and persons was coverage applicable?

Dependent Data

	Dependent #1	Dependent #2
Last Name		
First Name & Initial		
Relationship		
Social Security Number		
Data of Birth		
Child Care Expenses		
Health Insurance Coverage*		

Please provide the following:

Support for sources of income:

- Form(s) W-2
- Form(s) 1099 - Interest, Investment Income, Retirement Distributions
- Form(s) 1099B - Investment Sales
- Schedule(s) K-1
- Unemployment Income

Support for itemized deductions (see Deductions tab, page 2):

- Mortgage interest - Form 1098-INT
- Receipts for real estate taxes paid
- Receipts for charitable donations (cash and non-cash)
- Summary of medical expenses out-of-pocket (if the total exceeds 10% of your income)
- Support for large purchases (cars, boats, etc...) for the sales tax deduction

Support for other adjustments or credits:

- Student Loan Interest
- IRA Contributions
- Tuition and Education Expenses (for you or your dependents)
- Day Care Expenses
- Moving Expenses (if relocated more than 50 miles for work)
- Out-of-pocket Expenses for Qualified Educators
- HSA Contributions

If you bought or sold a home during the year, please provide copies of the settlement statement (HUD)

If you bought a car during the year, please provide a copy of the bill of sale

Date and amount of any estimated tax payments made during the year, if any.

Copy of last filed tax return.

Deductions

Below is a list of common expenses for the itemized deduction. Please include amount paid for during the tax year.

Medical

Note - Medical expenses must exceed 10% of your annual income before they will reduce your taxable income.

Doctors	
Dentists	
Hospitals	
Prescriptions	
Eye Glasses	
Medical Miles	

Taxes

Primary Residence Property Taxes	
Sales Tax Paid on Large Purchases (auto, boat, etc)	

Charitable Contributions

Note - Please provide receipts for charitable contributions.

Cash	
Non-Cash (include total FMV of items donated)	

Misc Expenses

Note - Misc expenses must exceed 2% of your annual income before they will reduce your taxable income.

Tax Preparation Fees	
Professional Dues	
Unreimbursed Employee Expenses	
Business Gifts	
Subscriptions	
Uniforms	
Tools	
Home Office (See home office worksheet)	
Job Hunting Expenses	
Investment Expenses	

Moving Expenses

Note - Moving expenses are deductible if you moved more than 50 miles for employment.

Number of miles from old home to old place of work	
Number of miles from old home to new place of work	
Transportation expenses (pack, crate, and move household goods)	
Storage of household goods (up to 30 days after removed from old home)	
Travel expenses (gas purchased or number of miles, parking, tolls)	
Lodging expenses	

Note - The following are not deductible moving expenses. Cost of meals while traveling, temporary living expenses, or house hunting expenses before/after move.