

# Karla Havemeier, LTD.

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## INCOME TAX WORKSHEET

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YEAR \_\_\_\_\_

Your Name: _____	Spouse's Name: _____
Social Security #: _____	Social Security #: _____
Date of Birth: _____	Date of Birth: _____
Occupation: _____	Occupation: _____
E-mail Address: _____	Cell Phone: _____
Address: _____	Home Phone: _____
Are you legally blind?    Yes ___ No ___	Is your spouse legally blind?    Yes ___ No ___

**DEPENDENTS**

Name	Social Security #	Grade	Date of Birth	Name	Social Security #	Grade	Date of Birth

**\*\*\*HOW MUCH WERE YOUR ECONOMIC COVID STIMULUS PAYMENTS RECEIVED? \_\_\_\_\_**

**WAGES - Attach all W-2s**

Employer	Gross	Fed W/H	State W/H	Social Security	Medicare

**INTEREST RECEIVED - Attach all 1099's    \*\*Do you have a foreign financial account that exceeded \$10,000 at ANYTIME during the year?**

Payer	Amount	Payer	Amount

**DIVIDENDS RECEIVED - Attach all 1099's**

Payer	Dividends	Qualified Dividends	Capital Gains	Non-Taxable

**RENTAL PROPERTY INCOME**

Description	Property 1	Property 2	Property 3
Rent Income			
Expenses:			
Real Estate Tax			
Interest			
Repairs/Maintenance			
Insurance			
Miles Driven    x    0.575			
Other - Specify			

**OTHER INCOME - Attach all Related Forms & 1099s**

Unemployment Compensation _____	Prizes / Awards / Gambling _____
Pension and Annuities / IRA Distributions _____	S-Corp, Partnership, Trust, Estate ( K-1's) _____
Social Security - Taxpayer _____	Commissions / Bonus _____
Social Security - Spouse _____	Jury Duty Pay _____
Sales of Property/Land - Include 1099-S _____	Cancelled Debt _____

**MISCELLANEOUS ITEMS - Residential Energy Credit is available again - ask about if you have improvements.**

Are you enrolled in a masters degree program in the teaching field? \_\_\_\_\_

Are you considered a beginning farmer, or are you renting land to or selling assets to a beginning farmer? \_\_\_\_\_

Have you set up a first-time homebuyer savings account? \_\_\_\_\_

Did you contribute to a Section 529 College Savings Plan during the year? If so, how much did you contribute? \_\_\_\_\_

Did you make any payments on your student loans?

If so: Original loan amounts \_\_\_\_\_ Payments made this year \_\_\_\_\_

Have you gifted anyone over \$15,000 worth of money or property this year? \_\_\_\_\_

Are you dealing in virtual currency? \_\_\_\_\_

