Karla Havemeier, LTD.

INCOME TAX WORKSHEET

www.havemeiercpa.com Phone: 507-354-7699 Fax: 507-354-7696

YEAR _____

107 S Broadway

New Ulm, MN 56073

PO Box 203

Your Name:	Spouse's Name:										
Social Security #:	Social Security #:										
Date of Birth:				Date of Birth: Occupation:							
Address:		Cell Phone: Home Phone:									
Are you legally blind?		Is your spouse legally blind? Yes No									
	Yes No				legally		103	<u> </u>			
DEPENDENTS											
Name	Social Security #	Social Security # Grade Date of Birth Name Social Sec		I Security #	curity # Grade Date of Birt						
***HOW MUCH WERE Y					CEIVED	2					
WAGES - Attach all W-2s		COVID	STINICLUS			·			<u> </u>		
	or		Gross	Fed W/H State		• W/H	Social Sec	curity Medicare			
Employ	ei		GIUSS	Feu W/H	Sidle	; VV/П	Social Sec	curity Medicare			
INTEREST RECEIVED - Att	ach all 1099's **	Do vou h	ave a foreign fi	nancial account th	at exceed	led \$10 (00 at ANYTI	ME during	the vear?		
Payer			nount		Payer	ιοα φτο,			mount		
i ayor		70	lount		i ayoi			Amount			
			· _								
DIVIDENDS RECEIVED - A	ttach all 1099's										
Payer			Dividends	Qualified Dividends Capital Gains Non-Taxable					n-Taxable		
,											
RENTAL PROPERTY INCOM	ME I	Property	1	Prope	erty 2			Property	3		
RENTAL PROPERTY INCOM Description		Property	1	Prope	erty 2			Property	3		
	ME	Property	1	Prope	erty 2			Property	3		
Description	ИЕ I	Property	1	Prope	erty 2			Property	3		
Description Rent Income	ME I	Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses:	ME I	Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax	ME I	Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax Interest		Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance		Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance		Property	1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575			1	Prope	erty 2			Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify	Related Forms & 109			rizes / Awards / Ga				Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all	Related Forms & 109		P		ambling	state (k		Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation	Related Forms & 109	9s	P	rizes / Awards / Ga	ambling o, Trust, E	state (K		Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I	Related Forms & 109	9s	P	rizes / Awards / Ga -Corp, Partnership	ambling o, Trust, E	state (k		Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer	Related Forms & 109 n Distributions	9s	P P S C J	rizes / Awards / Gá -Corp, Partnership ommissions / Bond	ambling o, Trust, E	state (k		Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu	Related Forms & 109 n Distributions	9s	P P S C J	rizes / Awards / Ga -Corp, Partnership ommissions / Bonu ury Duty Pay ancelled Debt	ambling b, Trust, E us		(-1's)	Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu	Related Forms & 109 n Distributions Ide 1099-S Residential Energy C	9s Credit is a	P P S C J available again	rizes / Awards / Ga -Corp, Partnership ommissions / Bonu ury Duty Pay ancelled Debt	ambling b, Trust, E us		(-1's)	Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu MISCELLANEOUS ITEMS - Are you enrolled in a masters	Related Forms & 109 n Distributions de 1099-S Residential Energy C degree program in the	9s Credit is a set teaching	P P S C J C available again g field?	rizes / Awards / Ga -Corp, Partnership ommissions / Bono ury Duty Pay ancelled Debt n - ask about if yo	ambling , Trust, E us pu have ir	nproven	(-1's)	Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA II Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu MISCELLANEOUS ITEMS - Are you enrolled in a masters Are you considered a beginning	Related Forms & 109 n Distributions Ide 1099-S Residential Energy C degree program in the ng farmer, or are you i	9s Credit is a e teaching renting la	P P S C J C available again g field?	rizes / Awards / Ga -Corp, Partnership ommissions / Bono ury Duty Pay ancelled Debt n - ask about if yo	ambling , Trust, E us pu have ir	nproven	(-1's)	Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu MISCELLANEOUS ITEMS - Are you enrolled in a masters Are you set up a first-time h	Related Forms & 109 n Distributions def 1099-S Residential Energy C degree program in the ng farmer, or are you n omebuyer savings acc	9s Credit is a set teaching la count?	P P S C J G Available again g field? nd to or selling	rizes / Awards / Ga -Corp, Partnership ommissions / Bonu ury Duty Pay ancelled Debt n - ask about if yo assets to a beginn	ambling b, Trust, E us bu have ir hing farme	nproven	(-1's) 	Property	3		
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Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu MISCELLANEOUS ITEMS - Are you considered a beginnii Have you set up a first-time h Did you contribute to a Section Did you make any payments of If so: Original loan	Related Forms & 109 n Distributions de 1099-S Residential Energy C degree program in the ng farmer, or are you i omebuyer savings acc n 529 College Savings on your student loans?	9s Credit is a test teaching renting la count? s Plan du	P P P P P P P P P P P P P P P P P P P	rizes / Awards / Ga -Corp, Partnership ommissions / Bonu ury Duty Pay ancelled Debt n - ask about if yo assets to a beginn If so, how much di e this year	ambling , Trust, E us bu have ir hing farme id you cor	nproven	(-1's) 	Property	3		
Description Rent Income Expenses: Real Estate Tax Interest Repairs/Maintenance Insurance Miles Driven x 0.575 Other - Specify OTHER INCOME - Attach all Unemployment Compensation Pension and Annuities / IRA I Social Security - Taxpayer Social Security - Spouse Sales of Property/Land - Inclu MISCELLANEOUS ITEMS - Are you enrolled in a masters Are you set up a first-time h Did you contribute to a Section Did you make any payments of	Related Forms & 109 n Distributions de 1099-S Residential Energy C degree program in the ng farmer, or are you i omebuyer savings acc n 529 College Savings on your student loans? amounts amounts \$15,000 worth of mon	9s Credit is te teaching renting la count? s Plan du count? Fey or prop	P P P P P P P P P P P P P P P P P P P	rizes / Awards / Ga -Corp, Partnership ommissions / Bonu ury Duty Pay ancelled Debt n - ask about if yo assets to a beginn If so, how much di e this year	ambling , Trust, E us bu have ir hing farme id you cor	nproven	(-1's) 	Property	3		

NON-BUSINESS ITEMIZED DEDUCTIONS

MEDICAL AND DENTAL:	(Expenses n	ot reimburs	ed by Insurance, HSA, I	FSA, MSA, E	Employer)				
Prescriptions & Drugs (Doctor prescri	bed only)		Other - Spe	ecify				
Doctors, Dentists, etc.									
Eyeglasses and Exams Hearing Aids and Supplies Hospitals									
				Long-Term	Care Insu	rance Pren	niums:		
				Taxpayer:					
Medical/Dental/Vision Insurance (Non-Employee)									
Nursing Home Care				Policy #					
Transportation Expense	e			Spouse:			_		
Miles Driven	x	.17		Ins. Co.					
Lodging				Policy #					
HSA CONTRIBUTIONS	Date	Amour	nt			Date	Amount		
Taxpayer				Spou	se				
	**	MAKE SUF	RE TO BRING IN ALL H	•	_	& 5498 **		_	
TAXES					. .	· · · -			
Real Estate Taxes Paid				Income I a			Prior Years		
Less: Refund Receiv	ed <u>(</u>)			Date	Am	ount Date	Amount	
Net Taxes Paid				Federal					
				State					
Auto License: Registra					_		_		
				Estimate Pa	-		fear		
	()				leral		State	
Vehicle 3	()		Date	e Paid	Amoun	t Date Paid	Amount	
								<u> </u>	
Sale Tax Paid on Large	Item Purchas	es		2nd				<u> </u>	
				3rd				<u> </u>	
				4th					
HAVE YOU FILED FOR Y	OUR 2019 PF	ROPERTY T	AX REFUND? Yes	No					
INTEREST ** If you purc	hasod or rofin	anced a hor	me this year bring in you	ir closing pa	nors / sottle	amont stat	omont (HUD_1)		
		anceu a noi	ne uns year bring in you						
Home Mortgage - Atta				Home Equi	•	a d 6a #0	_		
Home Mortgage (Paid	o Individual)				vas loan us				
Name							ase residence		
				Qualified M		surance Pi	remiums		
Social Security #				Investment					
				Student Loa	an Interest	- Attach a	all 1098-E's _		
CHARITABLE CONTRIB	JTIONS (Prov	ide if itemiz	zing or not) Need docu	mentation for	r any contri	ibution of \$	250 or more (cash	or non-cash)	
Church/Charitable Orga	anization Name	е	Cash Amount	Describe D	onated Pro	operty (Clo	thing/Household)	Property Value	
				Volunteer V	xpense				
				Miles Driven x .14					
				Out of P					
				outori					
OTHER DEDUCTIONS									
Unreimbursed Casualty or Theft Losses - Describe				Professiona			-		
Linninghumed Employee Everynees Maele Tayle Class at				Repayment			_		
Unreimbursed Employee Expenses - Meals, Travel, Tools, Class, etc.				Gambling L	Losses - To	extent of	winnings		
OTHER INFORMATION									
Educator/Teachers Exp	enses (K-12)			College Tu	ition - Mus	t include F	Form 1098T		
K-12 Ed Expense - Receipts Required; No Lunch, Clothes, Athletic Fees				College Bo	oks, Suppl	ies, Equipr	nent, etc.		
				-	t year of Co		-		
					-	- `	· _		
Private School Tuition	(K-12)								
	·			Adoption E	xpenses				
CHILD AND DEPENDEN					Provider				
							Child's News	Amount Da'd	
F	Provider Name	& Address		Social Security/Fed Tax ID # Child's Na				Amount Paid	
IRA CONTRIBUTIONS	Date	Traditior	nal Roth			Date	Traditional	Roth	
Taxpayer				Spou	se _		·		