

INCOME WORKSHEET

APPOINTMENT:

DAY _____ **DATE** _____ **TIME** _____

NAME _____ PHONE _____

ADDRESS (IF CHANGED FROM LAST YEAR):

CITY _____ STATE _____ ZIP _____

ANY NEW DEPENDANTS:

NAME _____ BIRTH DATE ____/____/____ SSN ____-____-____

NOTE: REVIEW DEPENDANTS CLAIMED ON LAST YEAR'S RETURN FOR DEPENDANCY STATUS THIS YEAR.

INCOME

INTEREST INCOME:

DIVIDEND INCOME:

<u>SOURCE</u>	<u>AMOUNT</u>	<u>SOURCE</u>	<u>AMOUNT</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OTHER INCOME:

ITEMS TO BRING WITH YOU

- | | | |
|---|-------------|--|
| 1. UNEMPLOYMENT INCOME | \$ _____ | 1. ALL W-2'S (WAGE & PENSION STATEMENTS) |
| 2. GAMBLING, LOTTERY, PRIZE WINNINGS & AWARDS | \$ _____ | 2. ALL 1099'S (DIV & INT STATEMENTS) |
| 3. IRA OR 401K PLAN WITHDRAWALS BANKS, ETC | \$ _____ | 3. ANY OTHER YEAR END TAX STATEMENTS BROKERS & BANKS |
| 4. PARTNERSHIP/CORP/TRUST INCOME FROM K-1'S (BRING K-1'S) | | 4. CLOSING DOCUMENTS ON SALES OF REAL ESTATE |
| 5. WAGE & PENSION INCOME - | BRING W-2'S | 5. YEAR END SOCIAL SECURITY STATEMENT OF INCOME |
| 6. TIPS RECEIVED | \$ _____ | 6. FORM 1095 HEALTH INS STATEMENT |
| 7. OTHER: _____ | \$ _____ | 7. FORM 1098T IF CLAIMING COLLEGE TUITIONS ALONG WITH AMT PAID FOR BOOKS |
| 8. OTHER: _____ | \$ _____ | |

CHILDCARE INFORMATION:

Name of Babysitter	Address	SSN or FED ID NO.	AMT
_____	_____	_____	\$ _____
_____	_____	_____	_____

NOTE: Please call us if you need additional worksheets for rentals, businesses or farms or you can print them out from our website, burttax.com.