

Last Name: _____

Phone # _____

Adams Bookkeeping Services Inc

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Deductions

Contributions to traditional IRA?		
Taxpayer	Date	Amount
Spouse	Date	Amount
Contributions to Roth IRA?		
Taxpayer	Date	Amount
Spouse	Date	Amount
Alimony paid? Need date of divorce		
Self employed health insurance		
Keoh, SEP & Simple Contributions		

Home mortgage interest (1098)
Home mortgage pd to individuals
Investment interest pd
Interest pd on student loan (1098-E)

Medical insurance premiums
Form 1095A - Market Place Insurance
MSA contributions
HSA contributions + acct balance 12/31
Prescriptions
Eyeglasses
Doctors
Dentists
Hospitals
Ambulances
Hearing aids & batteries
Medical travel expenses
Other medical expenses
Reimbursements

Donations to Church
Other cash contributions
Charitable auto mileage
Property donated for which you receipts (fair market value)

Real Estate Taxes
Personal property taxes
Sales Taxes
City/County Taxes
Other taxes

Estimated taxes Pd	IRS	State	City
Date Pd & amount			
Date Pd & amount			
Date Pd & amount			
Date Pd & amount			

Child Care Expenses

Providers Name	Address	ID# of Provider	Amount Paid	Which Child

Bank Account for direct deposit/or payment of taxes due

Bank Name	checking	savings	Routing number	Account number