INCOME:

(Check all that apply & include documents.)

* + Employer (W-2)
  + Self-Employment\*
  + Interest (1099-Int)
  + Social Security/Retirement
  + Dividends (1099-Div)
  + Rental Property\*
  + Stock or Mutual Fund sale (1099-B)
  + Unemployment

EXPENSES:

(Check all that apply & include documents.)

* + Self Employment\*
  + Un-reimbursed by your employer
  + Education
  + Rental Property\*
  + Medical/Dental care
  + Union Dues

CREDIT & DEDUCTIONS:

(Check all that apply & include documents.)

* + Donate cash or goods to a charity?
  + Pay Student Loan interest?
  + Pay Child/Dependent Care expense?
  + Have a Mortgage Payment? (1098)
  + Make an IRA Contribution?
  + Make a major taxable purchase?
  + Pay Property Taxes?

MISCELLANEOUS\*:

(Check all that apply.)

Did you or your spouse:

* + Sell a home?
  + Take an IRA or 401(k) distribution?
  + Pay/Receive alimony?
  + Adopt a child?
  + Suffer catastrophic loss?
  + Have gambling winnings/losses?

HEALTH INSURANCE

(Check all that apply & include documents.)

Were you or any members of your household:

* + Covered by a qualified private or

government health insurance plan?

* + Enrolled in a health insurance

plan through the federal or

state marketplace?

\* If this applies, we recommend you

meet with your tax professional to

discuss your tax situation before

dropping off your information.

Please feel free to contact our office for any further questions at 520-722-8363.

Sincerely,

Martin Tax

Notes to ask or share: