Vetscher & Associates, LLC

Certified Public Accountants

2550 UNIVERSITY AVE. W, SUITE 185S
SAINT PAUL, MN 55114
PHONE 651-690-2250, FAX 651-696-5183
TOLL-FREE 888-690-2250
Web Site: www.vetscher-cpas.com
Email: tvetscher@vetscher-cpas.com

INCOME TAX DATA-ITEMIZER

(T) TAXPAYER'S NAME	SS#	BIRTHDATE
(S) SPOUSE'S NAME	SS#	BIRTHDATE
(T) OCCUPATION	BLIND? Yes [ ] No [ ]	
(S) OCCUPATION	BLIND? Yes [ ] No [ ]	
ADDRESS		
PHONE: HOME WORK (T)	E-MAIL	

BANK ACCOUNT INFORMATION

(FILL OUT IF YOU WOULD LIKE YOUR REFUND DIRECT DEPOSITED OR IF YOU WOULD LIKE YOUR BAL DUE ELEC DEDUCTED FROM YOUR ACCOUNT)

NAME OF BANK	CHECKING ACCOUNT [ ] SAVINGS ACCOUNT [ ] (check one)
ROUTING NUMBER	ACCOUNT NUMBER

DEPENDENTS

NAME	SS#	BIRTHDATE	RELATIONSHIP	COST OF CHILD CARE

THINGS TO BRING

____ W-2'S
____ 1099-INT
____ 1099-DIV
____ FORM SSA-1099 (only if collecting Social Security)
____ OTHER 1099'S (A, B, C, K, G, LTC, MISC, PATR, Q, R, S, SA)
____ FORM 1095 (A, B, or C)
FORM 1098 (Mortgage Interest, E, T)
____ REAL ESTATE TAX BILLS
____ CLOSING PAPERS ON PURCHASING OR REFINANCING HOUSE (Form HUD-1)
LAST 3 YR'S RETURNS IF NEW CLIENT

ENITIRE FAMILY COVERED FOR FULL YEAR WITH MIN ESSENTIAL HEALTH COVERAGE? YES [ ] NO [ ] NOT SURE [ ]

WAGE INCOME (Form W-2)

T/S	EMPLOYER	WAGES	FED TAX	ST TAX WH	T/S	EMPLOYER	WAGES	FED TAX	ST TAX WH
		$	$	$			$	$	$
		$	$	$			$	$	$

DIVIDEND INCOME (Form 1099-DIV)

TSJ	PAYER	AMOUNT	QUALIFIED AMOUNT
		$	$
		$	$

INTEREST INCOME (Form 1099-INT)

TSJ	PAYER	AMOUNT
		$
		$

SALE OF STOCK OR OTHER PROPERTY - CAPITAL GAINS AND LOSSES (Form 1099-B or Form 1099-S)

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST/OTHER BASIS
			$	$
			$	$

RENTAL INCOME & EXPENSE

	AMOUNT
TOTAL RENT RECEIVED	$
EXPENSES:	
ADVERTISING	$
AUTO MILEAGE	$
CLEAN & MAINTENANCE	$
COMMISSIONS	$
INSURANCE	$
LEGAL & PROF FEES	$
MANAGEMENT FEES	$
MORTGAGE INTEREST	$
REPAIRS	$
SUPPLIES	$
TAXES	$
UTILITIES	$
ASSOCIATION DUES	$
OTHER	$

OTHER INCOME

IF YOU HAVE OTHER INCOME, PLEASE BRING ALL FIGURES AND SUPPORTING DATA.

	AMOUNT
UNEMPLOYMENT (Form 1099-G)	$
IRA DISTRIBUTIONS (Form 1099-R)	$
PENSIONS/ANNUTIES (Form 1099-R)	$
SOCIAL SECURITY (Form SSA-1099)	$
RAILROAD RETIREMENT (Form RRB-1099)	$
GAMBLING (Form W-2G)	$
ALIMONY RECEIVED	$
PARTNERSHIPS & S CORPS (Form K-1)	$
ESTATES & TRUSTS (Form K-1)	$
FORM 1099-MISC	$
SELF-EMPLOYED (See Small Biz Worksheet)	$
STATE TAX REFUND (Form 1099-G)	$
OTHER	$
OTHER	$

ITEMIZED DEDUCTIONS, ADJUSTMENTS, CREDITS AND OTHER ITEMS

ITEMIZED DEDUCTIONS

	AMOUNT
MEDICAL EXPENSES (TOTAL MUST BE OVER 10% OF INCOME)	
INSURANCE (NOT PRE-TAX)	$
PRESCRIPTIONS	$
NURSING HOME	$
GLASSES	$
DOCTORS	$
AUTO MILEAGE	$
LONG TERM CARE PREMIUMS PAID	$
LONG TERM CARE INS POLICY #	
TAXES	
STATE TAXES PAID ON PRIOR YEAR RETURN	$
MN EST TAX DATE	$
MN EST TAX DATE	$
MN EST TAX DATE	$
MN EST TAX DATE	$
REAL ESTATE TAXES	$
2ND HOME PROPERTY TAXES	$
AUTO LICENSE (TABS)	$
MAJOR SALES TAX PURCHASES	$
INTEREST EXPENSE	
HOME MORTGAGE (Form 1098)	$
SECOND MORTGAGE (Form 1098)	$
MORTGAGE INSURANCE PREMIUMS	$
CONTRACT FOR DEED	$
IF PAID TO AN INDIVIDUAL INCLUDE:	
NAME SS#_______-_____-_________	
ADDRESS	
POINTS PAID AT CLOSING	$
INVESTMENT INTEREST	$
OTHER	$
CONTRIBUTIONS	
CHURCHES/SYNAGOGUES	$
OTHER CASH CONTRIBUTIONS	$
CHARITABLE AUTO MILEAGE	$
FAIR MARKET VALUE OF NON-CASH DONATIONS (TO PLACES LIKE GOODWILL)	$
IF OVER $500, PROVIDE DETAILED LIST	
CASUALTY/THEFT LOSSES (MUST BE OVER 10% OF INCOME)	
COST OF PROPERTY LOST	$
FAIR MARKET VALUE OF PROPERTY	$
INSURANCE REMBURSEMENT RECEIVED	$
JOB EXPENSES (TOTAL JOB + MISC MUST EXCEED 2% OF INCOME)	
TOTAL MILES DRIVEN	
BUSINESS MILES IN ABOVE	
GAS & OIL	$
INTEREST	$
REPAIRS	$
TOLLS & FEES	$
MISCELLANEOUS EXPENSES (SEE NOTE IN JOB EXPENSES)	
TAX PREPARATION	$
UNION	$
PROFESSIONAL DUES	$

INCOME ADJUSTMENTS/DEDUCTIONS

PAYMENTS TO IRA (TRAD/ROTH), SEP, SIMPLE OR KEOGH

T/S	TYPE (TRAD/ROTH)	DATE	AMOUNT
			$
			$

	INTEREST PAID
STUDENT LOAN INTEREST (Form 1098-E)	
LENDER	$

	AMOUNT
MOVING EXPENSES (JOB RELATED)	
EXPENSES	$
EMPLOYER REIMBURSEMENT	$
MILES OLD HOME TO NEW WORKPLACE	
MILES OLD HOME TO OLD WORKPLACE	
HSA CONTRIBUTIONS (Form 5498-SA)	$
HSA DISTRIBUTIONS (Form 1099-SA)	$
FLEX SPENDING ACCOUNT (FSA)	$
SELF-EMPLOYED HEALTH INSURANCE	$
ALIMONY PAID SS#	$

TAX CREDIT ITEMS

	AMOUNT
RESIDENTIAL ENERGY CREDIT	
SOLAR WATER HEATERS	$
SOLAR PANELS	$
GEOTHERMAL HEAT PUMPS	$
SMALL WIND TURBINES	$
FUEL CELLS	$
CHILD CARE EXPENSES	
PROVIDER	$
ADDRESS	
PROVIDER'S ID/SS#	
PROVIDER	$
ADDRESS	
PROVIDER'S ID/SS#	

COLLEGE TUITION EXPENSES (Form 1098-T)		AMOUNT
WHO?	GRADE	$
WHO?	GRADE	$
WHO?	GRADE	$
WHO?	GRADE	$
ADOPTION EXPENSES		$
FOREIGN TAXES PAID (Form 1099-B, DIV, and/or INT)		$
MN K-12 EDUCATION EXPENSES		AMOUNT
WHO?	GRADE	$
WHO?	GRADE	$
WHO?	GRADE	$
529 PLAN CONTRIBUTIONS		$

OTHER

FEDERAL ESTIMATED TAXES PAID	4/15	$
FEDERAL ESTIMATED TAXES PAID	6/15	$
FEDERAL ESTIMATED TAXES PAID	9/15	$
FEDERAL ESTIMATED TAXES PAID	1/15	$
TOOLS		$
SAFE DEPOSIT BOX		$
GAMBLING LOSSES (TO THE EXTENT OF WINNINGS)		$
OTHER		$

ADDITIONAL ITEMS/QUESTIONS?

CREDIT CARD INFO *(FILL OUT ONLY IF YOU WOULD LIKE TO PAY YOUR TAX PREP FEE WITH A CREDIT CARD)*

CARD TYPE	ACCOUNT NUMBER	EXP DATE
SVC # (LAST 3 DIGITS ON BACK OF CARD)		