

TAX WORKSHEET

TAX YEAR 2014

NAMES _____
Address _____
Email Address: _____ **School District:** _____
Telephone (Home) _____ **(Work)** _____ **(Cell)** _____
Social Security Numbers: Yourself _____ Spouse _____
 Yourself _____ Spouse _____
Birthdate(s) _____

Dependents. NOTE: All dependents must have a social security number.

First Name and Middle Initial _____
 Social Security No. _____
 Date of Birth _____

If Iowa resident, how many dependent children do not have health care coverage? _____

Do you (and your spouse) want \$3 of your federal income liability to go to the Presidential Election Campaign Fund [it does not increase your taxes]? Yes No

Do you (and your spouse) want \$1.50 of your Iowa income tax liability to go to the Iowa Republican or Democratic Party, or 75¢ to each Party [it does not increase your taxes]? To Republican To Democratic One-half to Each No Checkoff

*** REPORTABLE INCOME ***

WAGES, SALARIES, TIPS, ETC.: Bring to the office all of your W-2 forms. List below names of your employer(s):

INTEREST INCOME: Bring to the office all of your 1099 forms showing interest payments to you. List below the names of persons who paid mortgage or real estate contract interest to you:

List below all other institutions or persons paying interest to you:

Also, list below all entities that paid you tax exempt interest, and the amount:
 \$ _____
 \$ _____

DIVIDEND INCOME: Bring to the office all of your 1099 forms showing dividend payments to you. Under new tax laws there is a lower tax rate for "qualified dividends". List below the names of companies which paid dividends to you:

SOCIAL SECURITY RECEIVED: A portion of your social security payment may be taxable. Bring to the office your Forms 1099/SSA showing total social security benefits.

PARTNERSHIP, LIMITED LIABILITY COMPANY, S-CORPORATION, ESTATE AND TRUST INCOME: Bring to the office all of the Forms K-1 you received reporting your share of income.

MISCELLANEOUS INCOME:

Pension, IRA, or Annuity Income \$ _____ \$ _____
 Unemployment compensation \$ _____
 Alimony (not child support) received \$ _____
 Disability Income from _____ \$ _____
 Other _____ \$ _____

TAX REFUNDS RECEIVED IN 2013: Federal: \$ _____ State: \$ _____

HIGHER EDUCATION EXPENSES (please bring in your 1098-T from the school as well as the tuition summary report provided by the school)

Student name _____ Year in College _____
 Tuition & Fees \$ _____ Course Materials \$ _____
 Student name _____ Year in College _____
 Tuition & Fees \$ _____ Course Materials \$ _____
 Student Loan Interest Paid \$ _____

CERTAIN EXPENSES (If you check yes, please provide supporting information):

Did you contribute to a 529 College Savings Plan? Yes No State _____
 Did you make energy-efficient improvements to your home? Yes No

INFORMATION FOR CHILD OR DEPENDENT CARE EXPENSES:

Number of persons cared for during year ()

PROVIDER'S NAME	ADDRESS	SSN/EIN	AMOUNT

FOR IOWA TAXPAYERS: pre-school expenses for children aged 3, 4, and 5. \$ _____
 BROWN, FAGEN & ROUSE, LAWYERS - Dallas Center, Iowa (taxkshst) 12/31/14