

# INCOME TAX DATA – 2011

## \* SECTION A

Please list names as they appear on Social Security cards.

Taxpayer's Name	Social Security #
Taxpayer's Occupation	Birth date
Spouse's Name	Social Security #
Spouse's Occupation	Birth date
Address	City State Zip
Phone # ( )	Do you want to donate to the Presidential Fund? (No additional Cost) Yes / No
E-mail	Will you be claimed on your parent's (or anyone else's) return this year? Yes / No
FILING STATUS: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separate <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widow	

## \* SECTION B

### DEPENDENTS

DO NOT INCLUDE CHILDREN WHO WILL BE CLAIMED ON ANOTHER TAX RETURN.

#	FIRST NAME	LAST NAME	SOCIAL SECURITY #	BIRTHDATE	RELATIONSHIP	DISABLED
1						
2						
3						
4						
5						
6						

\*Note: You must provide a social security number and year of birth for all dependents.

## SECTION C

### WAGE INCOME (Please send original W-2s)

#	COMPANY	EMPLOYEE	#	COMPANY	EMPLOYEE
1			4		
2			5		
3			6		

## SECTION D

### OTHER INCOME

If you have income from other sources, please list all totals and attach supporting documents. (1099s)

State Tax Refund	\$	Estates & Trusts (K-1)	\$	Partnerships & S-Corps (K-1)	\$
Alimony Received	\$	Social Security Benefits	\$	Jury Duty	\$
Prizes (1099-MISC)	\$	Unemployment (1099-G)	\$	Gambling Winnings (1099-G)	\$
Nontaxable Income	\$	Pension/Annuity (401K)	\$	Other	\$
Tips	\$	Scholarships & Fellowships	\$	Other	\$

## SECTION E

### INTEREST INCOME (1099-INT & 1099-DIV) BANK STATEMENT INFORMATION

BANK / PAYER	NAME ON ACCOUNT	AMOUNT	BANK / PAYER	NAME ON ACCOUNT	AMOUNT
		\$			\$
		\$			\$

## SECTION F

### STOCK SALE (1099-B)

STOCK OR PROPERTY NAME	DATE PURCHASED	COST	DATE SOLD	SALE PRICE
		\$		\$
		\$		\$
		\$		\$

## SECTION G

### RENTAL INCOME and EXPENSE

If you have more than one property, please list separately.

Please list all EXPENSE TOTALS.

ADDRESS OF PROPERTY					TOTAL RENT RECEIVED	\$
Advertising	\$	Legal/Professional Fees	\$	Property Taxes	\$	
Auto Mileage	#	Mortgage Interest	\$	Utilities	\$	
Cleaning/Maintenance	\$	Repairs	\$	Furnishings	\$	
Insurance	\$	Supplies	\$	Other	\$	

Sale of Rental: Purchase Price: \$ \_\_\_\_\_ Purchase Date: \_\_\_\_\_ Did you receive a 1099-S for property Yes / No  
 Sell Price: \$ \_\_\_\_\_ Sale Date: \_\_\_\_\_ \*Please include closing statements