

L D Financial Services Inc Tax Worksheets

Ph:978-664-1256 Fax: (978) 752-1237

lndfinl@gmail.com

New Clients complete demographic info below & bring or attach copy of last year's federal/State tax returns					
	First Name	Last Name	Date of Birth	Social Security#	Occupation
Taxpayer					
Spouse					
Dependent 1					
Dependent 2					
Dependent 3					
Dependent 4					
Dependent 5					
Street Address		City	State	Zip Code	
Taxpayer Email		Spouse Email		Banking Info (new client or changed)	
				Routing #	Account#
Home Phone	Taxpayer Cell	Spouse Cell			
			State	Dates/ State	Dates/ State
Residency	Full Year: Yes/No		Part Year		
Months of Coverage					
Health Insurance Coverage		Full Year: Yes/No	Part Year	J/F/M/A/M/J/J/A/S/O/N/D	
Employer coverage attach 1099-HC		Health insurance purchase via marketplace attach 1095			

INCOME

Wages	Bank Interest	Dividends	Investment Capital Gains/Losses		
Attach W-2's	Attach 1099-INT	Attach 1099-DIV	Consolidated 1099		
Pensions/IRA	Social Security	Unemployment	State Refund	Gambling	Cancel Debt
Attach 1099-R's	Attach SSA-1099	Attach 1099-G	1099-G	Attach W-2G	Attach 1099-C
Self-employment		Rental Income			
1099-Misc & complete info on pg 4		1099-Misc & complete info on page 4			
Amount received					
Partnership or Shareholder Income Attach K-1's			Alimony		

DEDUCTIONS

Amount		Amount	
Student loan Interest attach 1098		Teacher expenses	
Amount		Amount	
Health Savings Account Contributions		Alimony Paid	
Amount		Amount	
IRA Contributions		Reservist mileage	
Rent paid	Amount	> 100 miles	
MA residents		Performing Artist expenses	

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DEDUCTIONS

MEDICAL

Amount		Amount	
Prescriptions		Long term Care Insurance Premiums	
Amount		Amount	
Fees for doctors & dentists		Lab & X-ray fees	
Amount		Amount	
Long Term Care Expenses		Medical Supplies	
Amount		Amount	
Medical Mileage & trasport costs			
Amount			
Insurance Premiums paid out of pocket			
Amount			

State/Excise/Real estate Taxes

Amount		Amount		Amount	
Real Estate Taxes		2nd home taxes		Excise Tax	
Amount		Amount		Amount	
Personal Property Taxes		Sales taxes for large purchases			

Mortgage & equity line interest (Attach forms 1098 & bring HUD for refi or purchase)

Amount		Amount	
Mortgage Interst		Home equity line interest	
Amount		Amount	
Points paid			

Charity

Cash/Check/Credit Card Donations		Noncash donations of household items, cars & collectibles			
Name	Amount	Name	Dates	Amounts	

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Miscellaneous deductions which need to exceed 2% of Adjusted Gross Income

Nonreimbursed job expenses		Other deductions	
Amount		Amount	
Subscriptions		Investment fees	
Mileage		Attorney fees	
Air/taxis/travel		Tax prep fees	
Meals & Entertain		IRA fees	
Business gifts		Safedeposit box fee	
Continuing Ed			
Job Search costs			
Home office exp			

Other miscellaneous deductions not subject to 2% of adjusted gross income

Amount		Amount	
Gambling losses		Impairment related work costs	
Losses on annuity			
Casualty losses			

Credits

Attach 1098-T		Amount	Energy Savings Expenses	Amount
College Education Costs			Exterior Doors energy star	
Child Care Costs			Windows energy star	
Name of provider	Address	Soc Sec#/Tax ID	Metal or Asphalt roof energy star	
			with a pigment or garnules	
			Energy star hot water heater	
			Energy star gas or oil furnace	
			Solar electric costs	
			Solar water heating costs	
			Small wind energy costs	
			Geothermal heat pump costs	
			Quaified Fuel cell Property	

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Rental Property (Attach 1099-misc, if received them)

Property 1

Amount

Gross rent received	
Expenses	Amount
Accounting fees	
Advertising	
Auto mileage	
Bank Fees	
Cleaning	
Commissions	
Homeowners Ins	
Mortgage Insurance	
Legal fees	
Management fees	
Maintenance	
Mortgage Interest	
Repairs	
Real estate taxes	
Supplies	
Trash Removal	
Utilities	
Total Expenses	

Property 2

Amount

Gross rent received	
Expenses	Amount
Accounting fees	
Advertising	
Auto mileage	
Bank Fees	
Cleaning	
Commissions	
Homeowners Ins	
Mortgage Insurance	
Legal fees	
Management fees	
Maintenance	
Mortgage Interest	
Repairs	
Real estate taxes	
Supplies	
Trash Removal	
Utilities	
Total Expenses	

Self employment income for sole proprietors(attach 1099-misc, if received them)

Name of business				Type of business			
Street		City		State		Zip Code	
Address of business							
Amount							
Gross Income							
Returns/Refunds							
		Expenses				Amount	
Advertising							
Business Vehicle	Beginning Odometer						
	Ending Odometer						
Business mileage							
Commissions							
Contract Labor							
Dues							
Employee Benefits							
Insurance							
Interest							
		Legal & Professional					
		Materials expense					
		Meals & Entertain					
		Office Expenses					
		Rent					
		Repairs					
		Subscriptions					
		Supplies					
		Telephone					
		Utilities					