

11340 Eagle Drive – Suite 2 Mont Belvieu, TX 77523

cjohnstontax@yahoo.com

Individual Income Tax Information Sheet

This form is designed to assist you in compiling the information necessary to accurately prepare your income tax return.

Completing this form and returning it when you drop off your tax information will greatly expedite your filing process.

PLEASE PROVIDE ALL DOCUMENTS
THAT SAY "IMPORTANT TAX
INFORMATION" ON THE ENVELOPE!

Taxpayer	kpayerS						Occupation Occupation	
Spouse		Social Sec #						
Mailing Address					Home Phone			
•					Cell Phone			
					Email Address			
Filing Status (Check One)	() Single () Married	(d Filing Separately*) Married Filing Joint	* Spouse	() Head of Household Name & SS#:	() Widow/	Widower
			DEPENDEN	T INFORM	IATION			
First		M.I.	Last		Relation	DOB		SS#
Would you like to	have vour re	Sturn EEII ED2	() Voc. ()	\ No		Diro	ot Donocit I	nfo.
Would you like to	nave your re	turn EriLED?	() Yes () No	Bank Name:	Dire	ct Deposit I	110
Would you like to	have your re	efund direct deposi	ted? () Yes () No	Routing Numb			
would you like to	nave your re	eiuliu uliect ueposi	ieu: () les (,) INO	Account Num			
Did you have hea	Ith insurance	e coverage this pas	t year? () Yes () No	Account Num) Checki	na	() Savings
Was it with Obam) No	() Officer	119	() Cavings
Trao it Willi Obali	idodi oʻr ioditi i	ouroigov.	() 100 (, 140				
DIEAC		E ALL DOCUM	ENTS THAT SAY "I	MDODT	ANT TAY INCODMA	TION" C		NIVEL ODEL
FLEAS	L PROVID	E ALL DOCON	LNIS IIIAI SAI I	IMIPORI	ANT TAX INFORMA	ATTON C		INVELOPE:
	109	9s			W2s		Social	Security Income
1099 - B	Stock Sales			W2	Wage Income	3	SSA - 1099	
1099 - C	Cancellation	Of Debt		W2 - G	Gambling Winnings			
1099 - Div	Dividends Re	eceived From Invest	ments					
1099 - G	Unemployme	ent Compensation						
1099 - Int	Bank Interes	t Earned			1098s			K-1s
1099 - Misc	Miscellaneou	us & Contract Labor	Income	1098	Mortgage Interest Paid	1	041	Trust/Estate Income
1099 - R		& Pension Distributio		1098 - E	Student Loan Interest		065	Partnership Income
1099 - S	Proceeds Fr	om Real Estate Sale	S	1098 - T	Tuition Statement	1	120-S	Shareholder Income
** By signin	g this form, I	declare that I have	provided all information	to the bes	st of my knowledge and k	elief, it is t	rue, correct	, and complete**
Taxpayer or Spou	ıse's Signatu	ıre					Date)

Real Estate Sales/Pu	_			Deductable Teacher Expenses				
Bring Closing Statements from any Pu	rchase or Sale.				Amount	(\$250 Ma		
		Sto	ock Sales					
Name of Stock	# of Shares	Date Bought	Date Sold	Purchase Pri	се	Sale Price		
Quarterly Estimated Tax Pa	avments Made				IRA Contribu	ıtions Made		
	nt Paid Check #	_		-				
Credit applied from last year		-		Taxpayer:	Traditional	Roth IRA		
4/15		1		Chausai	Tuoditional	Doth IDA		
6/15 9/15		1		Spouse:	Traditional	Roth IRA		
1/15		1						
	•	-						
Medical & Dental Expenses	s (Paid By You)				Taxes	Paid		
Insurance Premiums		-			Real Estate Taxes Paid On Your Home			
Total Doctor/Dental/Hospital Visit Char		_			Other Real Estate Taxes (not on rental property)			
Total Medical Supplies(glasses, hear a	-		14	Sales Tax Paid On Major Purchases (Autos, Boats, Etc Item: Tax Paid:				
Total Prescription Drug Charges Total Medical Miles Driven		_			Item: Tax Paid: Item: Tax Paid:			
Total Medical Miles Driver		_		<u></u>		TAXT ald.		
Charitable Contribution	ons Made				Other Dec	ductions		
Cash or Check:	-		Tax Preparation Fee Paid					
Goodwill/Salvation Army Donations:	_		Union or Professional Dues					
Non-Cash Contributions:	-		Investment Expenses Safety Deposit Box Rental Fee					
(Must bring receipt for non-cash over \$	pOOO)			Загету Беро	osii dux Keniai Fee			
		Child Care (Credit Informat	ion				
Child Care Provider's Name	Addre	ess		SSN or EIN#	Amount Pai	d Child Cared For		

SELF-EMPLOYED

Business Name	
Business Address	
Type of Business Activity	
Began or Acquired Business this year? () Yes Accounting Method () Cash () Accrual (() No) Other (specify)
Income	Cost of Goods Sold
Gross Receipts or Sales	Beginning Inventory
Returns & Allowances	Purchases (For Resale)
_	Contract Labor
Expenses	Materials & Supplies
Advertising	Ending Inventory
Commissions & Fees	
Contract Labor	Dueinese Auto Mileere
Employee Benefit Programs	Business Auto Mileage Vehicle # 1
Insurance (other than health) Interest:	Date Put In Service
	Business Miles
Mortgage Other	Commuting Miles
Legal & Professional Services	Personal Miles
Office Expenses	Total Miles Driven
Pension & Profit Sharing Plans	Total Miles Briven
Rent or Lease:	
Equipment	Vehicle # 2
Vehicles	Date Put In Service
Office	Business Miles
Other	Commuting Miles
Repairs & Maintenance	Personal Miles
Supplies	Total Miles Driven
Taxes & Licenses	
Travel	
Meals & Entertainment	
Utilities	Home Office
Wages (reported on W2s)	Date Purchased:
Other Expenses:	Amount Paid:
Continuing Education	Total Sq. Ft
Business Telephone	Bus. Use Sq. Ft.
Business Cell Phone	Hours used per day for Business
Bank Fees	
Credit Card Fees	Mortgage Interest
Dues & Publications	Real Estate Taxes
Public Relations	Home Insurance
Tools	Repairs
Uniforms	Improvements
Website & Internet	Floatricity
	Electricity Gas
	Garbage
	Water
	Total Utilities
Major Purchases - Capital E	Expenses
Item Bought	Date Cost
Item Bought	Date Cost
Item Bought	Date Cost

FARM

Farm Address						
Type of Farm Activity						
Began or Acquired Farm this year Accounting Method	? () Yes () Cash () Accrual	() No () Other (specify)				
Income			uto Mileage			
Sales of Items bought for resale		Vehicle # 1				
Sales of Items Raised/Grown		Date Put In Service Farm Use Miles				
Expenses		Commuting Miles				
Chemicals		Personal Miles				
Contract Labor		Total Miles Driven				
Feed						
Fertilizer & Lime						
Gasoline, Fuel, & Oil		Vehicle # 2				
Insurance (other than health)		Date Put In Service				
Interest:		Farm Use Miles	·			
Mortgage		Commuting Miles	·			
Other		Personal Miles				
Legal & Professional Services		Total Miles Driven				
Office Expenses						
Pension & Profit Sharing Plans						
Rent or Lease:						
Equipment _						
Vehicles			e Office			
Office		Date Purchased:				
Other		Amount Paid:				
Repairs & Maintenance		Total Sq. Ft				
Seeds & Plants		Bus. Use Sq. Ft.	. D			
Storage & Warehousing		Hours used per day fo	r Business _			
Supplies Taxes & Licenses		Mortgogo Intoroct				
Travel		Mortgage Interest Home Insurance				
Meals & Entertainment Utilities		Repairs				
Veterinary, Breeding, & Medicine		improvements				
Wages (reported on W2s)		Electricity				
Other Expenses:		Gas	-			
Business Telephone		Garbage				
Business Cell Phone		Water				
Bank Fees		Total Utilities				
Credit Card Fees						
Dues & Publications						
Uniforms		Major Purchases	s - Capital E	xpenses		
Website & Internet		Item Bought	Date	Cost		
Public Relations			1			
•			1			
•						
-						
•						
•						

RENTAL INCOME WORKSHEET

Property # 2 Address Property # 3 Address Property # 5 Address Property # 6 Address ##1 #2 #3 #4 #5 #6 ##6 TOTAL RENTS RECEIVED ROYALTIES ##6 ##7 ##7 ##7 ##7 ##7 ##7 ##	Property # 1 Address								
Property # 5 Address	Property # 2 Address						_		
Property # 6 Address #1	Property # 3 Address								
M1	Property # 4 Address								
#1 #2 #3 #4 #5 #6 TOTAL RENTS RECEIVED ROYALTIES	Property # 5 Address								
TOTAL RENTS RECEIVED	Property # 6 Address								
TOTAL RENTS RECEIVED	ı	#1	T #2 T	#2	T #4	#5	#6		
Advertising	TOTAL DENTS DECEIVED	#1	#2	#3	#4	#3	#0		
Advertising Cleaning & Maintenance Lease fees / Commissions Lease fees / Commissions Lease fees / Commissions Legal and Accounting Management/HOA Fees Interest - Montgage Interest Other Interest Repairs - Misc. Supplies Taxes Ultilities Other: (List) Other: (List) Oil Depletion Major Purchase - Capital Expense Item bought Date Bought Cost Rental Auto Mileage Vehicle # 1 Date Put In Service Rental Use Miles Commuting Miles Commuting Miles Commuting Miles Commuting Miles Commuting Miles Commuting Miles Commuting Miles Commuting Miles									
Cleaning & Maintenance	RUTALIIES								
Cleaning & Maintenance	Advertising								
Lease fees / Commissions Insurance Legal and Accounting Insurance Management/HOA Fees Interest - Mortgage Interest Other Interest Interest - Mortgage Interest Repairs - Misc. Interest - Mortgage Interest Supplies Interest - Mortgage Interest Supplies Interest - Mortgage Interest Supplies Interest - Mortgage Interest Cother: (List) Interest - Mortgage Interest Other: (List) I									
Insurance									
Legal and Accounting									
Management/HOA Fees			1						
Interest - Mortgage Interest									
Other Interest			1						
Repairs - Misc. Supplies Su									
Supplies <									
Taxes									
Utilities									
Other: (List)									
Major Purchase - Capital Expense									
Major Purchase - Capital Expense Item bought Date Bought Cost (Appliances, improvements, etc) Rental Auto Mileage Vehicle # 1 Date Put In Service Rental Use Miles Commuting Miles Cost Cos	Other: (List)								
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Rental Auto Mileage Vehicle # 1 Vehicle # 2 Date Put In Service Rental Use Miles Commuting Miles Rental Use Miles Commuting Miles	Major Purchase - Capital Expense		Item bought		Date Bought	Cost			
Vehicle # 1 Vehicle # 2 Date Put In Service Date Put In Service Rental Use Miles Rental Use Miles Commuting Miles Commuting Miles	(Appliances, improvements, etc)				+				
Vehicle # 1 Vehicle # 2 Date Put In Service Date Put In Service Rental Use Miles Rental Use Miles Commuting Miles Commuting Miles					+				
Vehicle # 1 Vehicle # 2 Date Put In Service Date Put In Service Rental Use Miles Rental Use Miles Commuting Miles Commuting Miles									
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Rental Use Miles Commuting Miles Rental Use Miles Commuting Miles			_		<u> </u>				
Commuting Miles Commuting Miles									
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Personal Miles Personal Miles	Personal Miles			Personal Mil					
Total Miles Driven Total Miles Driven	·		_	Total Miles Driven					