**D R TAX SERVICE**

**Tax Payer Deduction Information**

**Tax Payer Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Tax Payer Phone #** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**THIS IS FOR TAX YEAR \_\_\_\_\_\_\_\_\_\_\_\_\_**

**Federal Refund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Owe Federal \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**State Refund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Owe State \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Information Needed For Tax Preparation** | ***Amount*** | ***Comments*** |
|  | **Medical Insurance** |  |  |
|  | **Medical Mileage/ Parking** |  | |  |
|  | **Medical Bills/Co Payments/Prescriptions** |  |  |  |
|  | **Dental Bills/Co Payments** |  |  |  |
|  | **Vision Bills/Co Payments** |  |  |  |
|  | **Real Estate Taxes/Property Taxes** |  |  |
|  | **Mortgage Insurance Paid** |  |  |
|  | **Mortgage Interest** |  |  |
|  | **Ad Valorem Taxes/Car Tags** |  |  |
|  | **Emission Fees** |  |  |
|  | **Tithes, Churches & School (Name Of Place)** |  |  |
|  | **Charity Donations (Name Of Place)** |  |  |
|  | **Child Care: 13yrs & Under (Name of Place, Address, EIN)** |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | **Additional Forms Needed: W2/W2G/1099R-RRB/1099SA/1099SSA****1099C/1099M/1099G /1098T/ 1098 E / 1095 A, B or C Health Care** |  |  |
|  | ***Verify Bank Account Information******Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_******Routing#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_******Account#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_******Bank \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Type\_\_\_\_\_\_\_\_\_\_\_*** |  |
|  | ***Additional Comments or Questions:*** |  |
| ***X*** |
| ***By signing this form you agree that all information submitted is true and accurate to the best of your knowledge and corresponds with verified documents.*** |

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