

# INCOME TAX WORKSHEET

**NAME** \_\_\_\_\_ **SOCIAL SECURITY NO.** \_\_\_\_\_

**EMAIL** \_\_\_\_\_

Dependents: (list name, social security number and relationship)

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**Personal Deductions:**

Medical Premiums:	\$
Long Term Care Premiums:	\$
Prescripts & Medicine	\$
Doctors, Dentists	\$
Hospitals	\$
Other - Itemize (eyeglasses, Hearing aids, etc.)	\$

Taxes:	
Personal Residence RE Tax	\$
Sales Tax Paid on Boats, Vehicle & other Special Items	\$

Interest:	
Home Mortgage	\$
Home Mortgage to Individuals	\$

Charitable Contribs-Itemize:	
	\$
	\$
	\$
	\$

Retirement Acct Contribution:	
Trad IRA (Taxpayer)	\$
Trad IRA (Spouse)	\$
Other - Itemize	
	\$
	\$
	\$

\*\*\* With the changes & greatly increased standard deduction rates (Joint \$24,800 & Single \$12,400) it is very important, if you can use an AgriPlan/BizPlan, in your business, you do so. If you don't own a business, discuss with your employer about implementing a FlexSystem/Cafeteria Plan. Our office can help setup these plans for you or your employer. If available, take full advantage of these plans.