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FOX TAX PLANNING AND PREPARATION

503 FIRST AVE NORTHEAST
MINNEAPOLIS, MINNESOTA 55413
PHONE: 612.824.2829
FAX: 612.331.3670
WWW.FOXTAXSERVICE.COM

THINGS TO BRING / DO NOT FORGET		
**All Tax Forms Received	**Signed Engagement Letter	**Purchase, Sale, or Refinance Papers for Homes & New Cars
**Copy of Previous Year's Taxes (if New Client)		**CD-ROM with taxes that you were given last year
** Bring Proof & Cost for Energy Efficient Upgrades to Home		
**Breakdown of Income/Expenses for Self Employment and/or Rental Income - See other Worksheets		
FOR CORPORATIONS & PARTNERSHIPS: Remember to bring Year End Balances to all Accounts and Loans.		

TAX PREPARATION WORKSHEET

PERSONAL DATA

Taxpayer Name	Spouse's Name	
SSN	SSN	
DOB	DOB	
Phone	Phone	
Email	Email	
Occupation	Occupation	
Address		
City	State	Zip

DEPENDENTS

CHILD ONE		CHILD TWO		CHILD THREE	
Name		Name		Name	
SSN		SSN		SSN	
DOB		DOB		DOB	
Relationship		Relationship		Relationship	
Daycare Expense	K-12 Education Expense	Daycare Expense	K-12 Education Expense	Daycare Expense	K-12 Education Expense
Daycare Name		Daycare Name		Daycare Name	
Daycare SSN/Fed ID#		Daycare SSN/Fed ID#		Daycare SSN/Fed ID#	
Daycare Address		Daycare Address		Daycare Address	

INCOME

Interest Earned:	Dividends:	Cap Gains:
Wages: (bring W-2s)	Pension: (Bring 1099-Rs)	Alimony:
Soc. Security:	Unemployment:	Rental: Fill out Rental Sheet
Bring all tax forms to document earnings. For Self Employment, see separte Income/Expense Sheet		

DEDUCTIONS

Student loan interest:	IRA Contributions:	Type: ☐ IRA ☐ ROTH ☐ SEP
College Tuition/Fees:	Investment Exp:	Job Expenses:
Mortgage Int Pd:	Property Tax:	Union Dues:
Medical Expenses:	Health Insurance:	Car Tabs:
Charity by Cash/Check:	Non-Cash Charity:	Tax Prep Fees:
Alimony Paid:	HSA Contributions:	PMI: