

# TAX PREPARATION WORKSHEET

## PERSONAL DATA

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

## DEPENDENT ONE

## DEPENDENT TWO

## DEPENDENT THREE

Name	Name	Name
SSN	SSN	SSN
DOB	DOB	DOB
Relationship	Relationship	Relationship
<a href="#">K-12 Education Expense</a>	<a href="#">K-12 Education Expense</a>	<a href="#">K-12 Education Expense</a>
Daycare Expense	Daycare Expense	Daycare 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

## DEDUCTIONS

Student Loan Interest*	Car Tabs
College Tuition/Fees	Property Taxes
College Books and Req. Supplies	Mortgage Interest Paid
Health Insurance	Home Eq. Loan Interest**
HSA Contributions	Mortgage Insurance (PMI)
Medical Expenses	Charity by Cash/Check
Long Term Care Ins Premiums***	Non-Cash Charity****
Employee Expenses	Educator Classroom Expenses
Tax Prep Fees	Investment Expenses
Alimony Paid (Bring SS# of Recipient)	529 Contributions***
IRA contributions	IRA      ROTH      SEP

\* See Page 4 for detailed information needed to claim potential [MN CREDIT](#)

\*\* Home equity interest is no longer deductible if used for something other than home improvements/purchase.  
Bring details on loan balances and use of proceeds.

\*\*\* Bring Company Name and Account Numbers as well as amounts paid

\*\*\*\* Bring itemized donation receipts if non-cash donations exceed \$500. [Click Here](#) for help valuing your non-cash donations.

## ADDITIONAL NOTES OR QUESTIONS

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