



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**
H S A 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