Reliable Income Tax Service

5816 N Greeley Avenue (503) 289-4500

Income

Client _____

Wages: Bring all W-2 forms

Unemployment: _____ (Bring all 1099 forms)

Social Security / R.R. benefits: _____ Taxpayer _____ Spouse

Alimony: _____

IRA Withdrawls: Bring all 1099 forms

Employee Retirement Plan / 401K Withdrawls: Bring all 1099 forms

Pension Income: Bring all 1099 forms

Annuity Income: Bring all 1099 forms

Gambling Winnings: _____

Interest Income:

Payer	Amount received

Dividend Income: (Bring all 1099 forms)

Payer	Amount received

Stock Sales: Bring all 1099 forms. (We will also need to know what you paid for any stock you sold.)

Miscellaneous

IRA Deposits made: _____ Taxpayer _____ Spouse

HSA Deposits made: _____

During the past year, did you:

1. Purchase a hybrid vehicle? (please circle) YES / NO
2. Make any energy-saving home improvements? (please circle) YES / NO
3. Pay for any college tuition for yourself, your spouse, or your children? (please circle) YES / NO
4. Pay for any childcare? (please circle) YES / NO

   (If so, we need the name, address, social security / federal ID number, and amount paid to each individual or day care business.)

Estimated Taxes paid: _____ Federal _____ State