

L&D Financial Services

280 Main St.

Suite #102

No. Reading, MA 01864

Please have the following tax forms:

- ☐ Copy of last year's tax returns
☐ W-2's (wages) ☐ W-2P's (pensions)
☐ 1099's re: Interest & Dividend Income; Unemployment
☐ Soc. Sec.; I.R.A./401K/P.S. withdrawals;
☐ Lottery Winnings; State Tax Refund.

DEMOGRAPHICS (COMPLETE IF NEW OR CHANGED FROM PRIOR YEARS)

DEPENDENTS	NAME	SOC. SEC.#	YEAR OF BIRTH	OCCUPATION
TAXPAYER				
SPOUSE				
CHILDREN				
CHILDREN				
CHILDREN				
CHILDREN				
OTHER				

INCOME (PLEASE COMPLETE APPROPRIATE SCHEDULE ON PAGE 2 & 3)

Interest Income - schedule B. Self employment - schedule C
Dividend Income - schedule B Rental Income - schedule E
Capital gains & losses - schedule D

ADJUSTMENTS

I.R.A. contribution _____ Forfeited interest _____

Alimony Paid _____ Name _____ Soc. Sec. # _____

Employee business/auto expenses, complete schedule - #2106 on page 4

MEDICAL

Medical ins. _____ Prescriptions _____ Eyeglasses _____

Doctors/Dentists _____ Hospitals/Labs _____ Other _____

TAXES

Real Estate _____ Excise _____ Other _____

Prior year state tax due _____

State estimated tax payments _____

Federal estimated tax payments _____

INTEREST PAID

Mortgage _____ Equity _____ Vacation Home _____ Student _____

CONTRIBUTIONS

Total cash & checks _____ Clothing & furniture _____

EMPLOYMENT

Union & professional dues _____ Tools, safety shoes, equipment _____

Uniforms/shoes/cleaning _____ Education/tuition/books _____

OTHER

Tax prep fee _____ Safe dep. box _____ IRA fees _____ Other _____

CHILD CARE

Child's name _____ Amount paid _____

Provider's name _____

Address _____ Tax i.d./Soc. Sec. # _____

RENTAL DEDUCTION

Landlord _____ Address _____ Dates _____ Amount _____

Landlord _____ Address _____ Dates _____ Amount _____