

SECTION 2: INCOME – Use the following worksheet as a guide to report your income. Indicate which & how many documents you are enclosing. There is no need to enter total as long as you provide preparer with non-returnable copies of source and/or supporting documents.

√	TYPE OF INCOME	DOCUMENT ENCLOSURES	TAXPAYER		SPOUSE	
			How Many	Gross Amount	How Many	Gross Amount
	Wages & Salaries					
<input type="checkbox"/>	Regular Wages	W-2		\$		\$
<input type="checkbox"/>	Foreign Wages			\$		\$
<input type="checkbox"/>	Not Reported on W-2 (Tips, Household Employee, etc.)	Earning Statement		\$		\$
<input type="checkbox"/>	Business Income (including Statutory Employees)	1099-Misc (See Biz Organizer) Income & Expense Summary		\$		\$
<input type="checkbox"/>	Rental Income	1099-Misc (See Rental Organizer) Income & Expense Summary		\$		\$
<input type="checkbox"/>	Interest Income	1099-Int's , 1099-OID's., etc.		\$		\$
<input type="checkbox"/>	Dividend	1099-Div's		\$		\$
<input type="checkbox"/>	Sale of Stocks, Bonds, Home, Land, etc.	1099-B's, 1099-S's, Settlement Statements, Broker Statements, etc.		\$		\$
<input type="checkbox"/>	IRA/ Pension / 401(K) / Annuity *Early Distribution	1099-R, CSA 1099-R, CSF 1099-R *Provide reason for early withdrawal		\$		\$
<input type="checkbox"/>	Lump Sum Distributions, Roll-overs, Conversions	Retirement Date & Exclusion History Cost of Plan & Contribution History		\$		\$
<input type="checkbox"/>	Social Security/RRB Income	SSA-1099, RRB-1099		\$		\$
<input type="checkbox"/>	*SS Benefits Lump Sum Settlement	*Claim Settlement Expenses		\$		\$
<input type="checkbox"/>	Disability & Sick Pay (may qualify for exclusion)	1099-LTC, W-2 , etc.		\$		\$
<input type="checkbox"/>	Unemployment	1099-G		\$		\$
<input type="checkbox"/>	State Tax Refund	1099-G		\$		\$
<input type="checkbox"/>	Alimony Received (not child support)	Divorce Decree		\$		\$
<input type="checkbox"/>	Gambling Winnings	W2-G, Expense Summary		\$		\$
<input type="checkbox"/>	Jury Duty	Pay Stubs		\$		\$
<input type="checkbox"/>	Health Savings Account Distributions	1099-SA		\$		\$
<input type="checkbox"/>	Cancellation of Debt & Foreclosures	1099-C, 1099-A		\$		\$
<input type="checkbox"/>	Prizes & Awards	1099-Misc		\$		\$
<input type="checkbox"/>	Other	Enclose Records		\$		\$
<input type="checkbox"/>	Other			\$		\$

Scholarship/Fellowship Income

I am a Degree Candidate.

Expenses	Cost	Amount Applied	Your scholarship may or may not be taxable.
Tuition	\$	\$	Itemize your education costs & indicate how your scholarship or fellowship award was applied.
Fees	\$	\$	
Books	\$	\$	
Supplies	\$	\$	
Equipment	\$	\$	
Room & Board	\$	\$	
Travel	\$	\$	
Clerical Help & Other Incidentals	\$	\$	
Amount used for teaching, research, and other services.	xxx	\$	
TOTAL		\$	