## Gail Williams, Inc.

4849 E. 12<sup>th</sup> St Tucson, AZ 85711

Phone/Fax:520-867-8482 gailwilliamstax.com rgreene@gailwilliamstax.com bgreene@gailwilliamstax.com

MEDICAL	
Prescriptions	
Med./Dental Ins.	
Medicare Prem.	
Doctors Paid	
Dentist Paid	
X-Ray/Lab Fees	
Hospital	
Nursing Home	
Hearing Aid/Batt	
Glasses/eye exam	
Contacts/Solution	
Other Med. Exp.	
Long Term Care	taxpayer
Long Term Care	spouse
Med drive miles	
Ins. reimbursed	
1095 A	

TAXES	
AZ Tax Paid	
Other State Tax	
Real Estate Tax	home
Real Estate Tax	land
Auto License Tax	
Misc License Tax	
Sales Tax Paid	
Tax on car, boat,	
home	

New Clients: Please Bring a Copy of Last Year's Income Tax Return

INTEREST	
Home Mortgage	
From Form 1098	
Home Mortgage	
to an individual:	
Name:	
Address:	
Social Security #	
Home equity loan	
Points, Refinance	
Interest 2 <sup>nd</sup> home	
Points, New Loan	
Invest. Interest	
Student Loan	
Date Payment	
Started	
CONTRIBUTION	
CONTRIBUTION	

CONTRIBUTION	
House of Worship	
Charitable Org.	
Charitable Miles	
AZ Tax Credit	Contributions
AZ Qualifying	
Charitable Org.	
Name:	
AZ Public School	
Name:	
AZ Private School	
Name:	
AZ Foster Care	
Name:	
AZ Military Fund	_

CONTRIBUTION	Other than \$\$
Clothing/Household	
Other	
Mileage to Deliver	

EDUCATION	
1098-T (tuition)	
Account Activity (billed <b>and</b> paid)	
Books/Supplies	
529 Contribution	
1099-Q	
Room/Board if 529 or Coverdell plans	

ENERGY PROP	(if qualified)
Solar Electric	
Water Heater	
Window/Doors	
Skylight	
Insulation/air seal	
Central Air	
Air Heat Pumps	
Electric Car	

taxpayer
spouse
taxpayer
spouse

MISCELLANEOUS	
Teacher Expenses	
Gambling Losses	

	Estimated	Taxes	
Due	Date Paid	Federal	State
April			
June			
Sept.			
Jan.			

CHILD	CARE
Amt Pd.	
Paid To:	
Address:	
SS# or EIN#	
ALIMONY	(pre-2019 divorce)
Amount Paid	
Paid To:	
Address	
SS#	

					Itam	A ma asset				
Social Security #			Birtl	h date//	<ul><li>Item</li><li>Gross Receipts or Sales</li></ul>	Amount		Amount	Amount	Amount
					Gross Receipts of Bules		Gross Rents			
Driver's Lic. #		Issued	1//	Exp//_	Ending Inventory		Advertising			
SPOUSE					- Advertising		Auto/Travel (miles)			
Social Security #			Dist	h data / /			Cleaning			
					Total Miles		Insurance – hazard			
Driver's Lic. #		Issued	1_/_/	Exp//_	Insurance other than health		Insurance – mortgage			
					Business interest (not auto)		Interest 1			
Dependents	Social	Security #		Birth Date	Office supplies/expenses		Interest 2			
					Rent – building		Legal/accounting			
					Rent – equipment		Management			
					Repairs & maintenance		Repairs & maintenance			
					Travel Expenses		Supplies	1		
GAINS & LOSSES I	FROM SALE	OF PROP	ERTY.	STOCKS, ETC.	Entertainment		Taxes	1		
GAINS & LOSSES FROM SALE OF PROPERTY, STOCKS, ETC.		Meals		Phone						
Description	Date Bought	Date Sold	Sale Price		THORE		Utilities	+		
	Dought	Solu	Titee		Utilities		Association fees	+		
					Wages		Bank/collection fees	+	<del>                                     </del>	<del> </del>
					Payroll Taxes		Other:	<del> </del>		
							Other.	<del>                                     </del>		
BRING TI	HESE TAX D	OCUMEN	NTS WI	TH YOU				<del>                                     </del>	<u> </u>	<del>                                     </del>
Wages = W2(s)	Stock Salas -	- 1000 B	Divido	nds = 1008/1000s				<del>                                     </del>	<del>                                     </del>	
wages – wz(s)	Stock Sales –	- 1099 Б	Divide	1108 = 1096/10998	*Actual auto expenses if use instead of mileage			<del> </del>		
					use histead of fifficage					
DIVIDEND INCOMI	E	INTERE	ST INC	OME	OTHER INCOME		OTHER INCO	)ME		
Corporation Name Amount Received From Amount T		Type of Income	Amount	Type of Income		Amo	ount			
<del>-</del>					Social Security - Taxpayer		Tips			
					Social Security - Spouse		Royalties			
					Lottery Winnings		Prizes & Awards			
Bri		Bring 1099R – Pensions		Unemployment or Jury Du	ıty					

State Refunds

Gambling Winnings

Trust Income – Bring K-1 Forms

Partnerships – Bring K-1 Forms

S-Corporations – Bring K-1 Forms

SELF-EMPLOYMENT

TAXPAYER \_

RENTAL PROPERTY (bring any closing statements)

IRA Rollovers and/or Withdrawals

Alimony Received (Pre-2019 divorce)

Grants – Scholarships

Other: