

INCOME

FORM W-2: WAGES

T	S	TAXABLE WAGES	FED W/H	S.S. TAX	MDCR TX	ST. W/H	NYS 414 (H)	DCB	EMPLOYER
									TOTALS
				S.S. TAX OVER \$4,485.60 EACH					

(I) INTEREST & (D) DIVIDEND INCOME

T = TAXPAYER, S = SPOUSE, J = JOINT

T	S	J	I/D	SOURCE	TOTAL	QUALIFIED	CAP GAIN DIST	FOREIGN TAX	FWT	TAX EXEMPT INTEREST NON TXBL	STATE TXBL
TOTAL INTEREST											
TOTAL DIVIDENDS											

DO YOU HAVE ANY FOREIGN ACCOUNTS OR SIGNATURE AUTHORITY TO USE ANY FINANCIAL ACCOUNTS IN A FOREIGN COUNTRY?

Yes No

IF YES, PLEASE PROVIDE THE NAME(S) OF THE FOREIGN COUNTRY? _____

PLEASE PROVIDE THE FOREIGN ACCOUNT BALANCE(S): _____

INCOME (CONTINUED)

DESCRIPTION	GROSS	TAXABLE	TAXPAYER	SPOUSE	FWT
ST. TAX REFUND					
1040C / SELF EMP					
1040D / CAP GAINS					
1040E / RENTAL PROPERTY					
K-1:					
K-1:					
PENSIONS:					
PENSIONS:					
PENSIONS:					
IRA:					
IRA:					
UNEMPLOYMENT INS / ALIMONY					
SOCIAL SECURITY					

ADJUSTMENTS / CREDITS

ITEM	TOTAL		TOTAL
IRA / SEP / SIMPLE / ROTH		529 COLLEGE SAVINGS DED (NYS)	
COLLEGE TUITION DEDUCTION		MOVING EXPENSE / DP DEDUCTION	
STUDENT LOAN INTEREST		ADOPTION CREDIT	
EDUCATORS' EXPENSE		RESIDENTIAL ENERGY TAX CREDITS	
SAVINGS PENALTY/ALIMONY PAID		RETIREMENT SAVINGS TAX CREDIT	
HEALTH SAVINGS ACCOUNT		HOMEBUYER'S CREDIT REPAYMENT (\$500 STARTING IN 2010 - YEAR 2 OF 15)	
SELF-EMPLOYED HOSPN (100%)		EDUCATION CREDITS (AMERICAN OPP / LIFETIME)	
SOC SEC EXP: SELF-EMPLOYED		NYS: COLLEGE TUITION CREDIT / ITEMIZED DEDUCTION	

CHILD CARE CREDIT (UNDER 13)

W-2 AMOUNT _____

NO. CHILDREN _____

AMOUNT PAID \$ _____

FEDERAL RATE _____ %

FED. CREDIT \$ _____

NYS RATE _____ %

NYS CREDIT \$ _____

PROVIDER: _____

I. D. # : _____

ADDRESS: _____

STUDENT NAME:		
COLLEGE NAME & ADDRESS		
TUITION & FEES		

ESTIMATED TAX PAYMENT RECORD

		FEDERAL	STATE
2010 OVERPYMT.		\$	\$
#1 04/18/11		\$	\$
#2 06/15/11		\$	\$
#3 09/15/11		\$	\$
#4 01/17/12		\$	\$
TOTALS		\$	\$

