

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:	Cares Act	3 Year			
PENSIONS:	Cares Act	3 Year			
PENSIONS:	Cares Act	3 Year			
IRA:	Cares Act	3 Year			
IRA:	Cares Act	3 Year			
HSA DISTRIBUTION:					
EDUCATION EXP: 1099-Q					
UNEMP INS / ALIMONY - DIV DATE					
SOCIAL SECURITY					

ADJUSTMENTS / CREDITS

ITEM	TOTAL	TOTAL
IRA / SEP / SIMPLE / ROTH		ECONOMIC IMPACT PAYMENT REC
CHARITABLE CONT DEDUCTION		529 COLLEGE SAVINGS DED (NYS)
STUDENT LOAN INTEREST		QUALIFIED BUS INCOME DEDUCTION
EDUCATOR EXP / SAVINGS PNLTY		NET PREMIUM TAX CREDIT
ALIMONY PAID / DIVORCE DATE		RESIDENTIAL ENERGY CREDITS
HEALTH SAVINGS CONTRIBUTION		CARES ACT: SICK/FAMILY TAX CREDITS
SELF-EMPLOYED HOSPN (100%)		HOMEBUYER'S CREDIT REPAYMENT (\$500 STARTING IN 2010-YEAR 10 OF 15)
SOC SEC EXP: SELF-EMPLOYED		EDUCATION CREDITS / DEDUCTION (AMER OPP / LIFETIME / TUIT FEES)
RETIREMENT SAVINGS TAX CREDIT		NYS: COLLEGE TUITION CREDIT / ITEMIZED DEDUCTION

CHILD CARE CREDIT (UNDER 13)

W-2 AMOUNT \$ _____

NO. CHILDREN _____

TOTAL CHILD CARE PAID \$ _____

STUDENT NAME:		
COLLEGE NAME		
COLLEGE ADDRESS		
TUITION & FEES PAID IN 2020		

FEDERAL RATE % FED CREDIT \$ _____

NYS RATE % NYS CREDIT \$ _____

PROVIDER PROVIDER: _____

I. D. #: I. D. #: _____

ADDRESS: ADDRESS: _____

AMOUNT AMOUNT _____

ESTIMATED TAX PAYMENT RECORD

	FEDERAL	STATE
2020 OVERPAYMENT	\$ _____	\$ _____
#1 4/15/2020	\$ _____	\$ _____
#2 6/15/2020	\$ _____	\$ _____
#3 9/15/2020	\$ _____	\$ _____
#4 1/15/2021	\$ _____	\$ _____
TOTALS	\$ _____	\$ _____

