



MATTHEW R. LENTS, CPA, CMI

PERSONAL TAX WORKSHEET

INCOME

- | | |
|--|--|
| ☐ W-2'S | ☐ 1099'S: |
| ☐ K-1'S: ACTIVITY REPORTING FOR
BUSINESS INVESTMENTS | <ul style="list-style-type: none">• INTEREST FROM BANKS |
| ☐ RENTAL PROPERTY
** WORKSHEET AVAILABLE | <ul style="list-style-type: none">• INVESTMENT DIVIDENDS |
| ☐ ALIMONY RECEIVED: DATE FINALIZED | <ul style="list-style-type: none">• STOCK SALES/LOSSES |
| | <ul style="list-style-type: none">• PENSIONS/ANNUITIES |
| | <ul style="list-style-type: none">• PRIZES/BONUSES |
| | <ul style="list-style-type: none">• SOCIAL SECURITY |
| | <ul style="list-style-type: none">• RETIREMENT WITHDRAWALS |

DEDUCTIONS - SEE DETAILS ON NEXT PAGE

- | | |
|---|--|
| ☐ MEDICAL EXPENSES *** | ☐ EDUCATIONAL EXPENSES |
| ☐ TAXES | ☐ ENERGY EFFICIENT IMPROVEMENTS |
| ☐ INTEREST PAID | |
| ☐ CHARITABLE CONTRIBUTIONS | |

MISCELLANEOUS

- ☐ REAL ESTATE TRANSACTIONS CLOSING STATEMENTS/REFINANCE
- ☐ CONTRIBUTIONS TO RETIREMENT ACCOUNTS
- ☐ MOVING EXPENSES (MILITARY)
- ☐ ALIMONY PAID
- ☐ LOSS FROM THEFT, FIRE OR VANDALISM, STORM DAMAGE
- ☐ CHILDCARE EXPENSES
- ☐ 1095-A HEALTHCARE FORMS

1201 North Third Street Jacksonville Beach, Florida

(904) 241-0050 Fax (904) 241-0752 taxadvantage@taxadvantage.org



MATTHEW R. LENTS, CPA, CMI

PERSONAL TAX WORKSHEET

DEDUCTIONS - *DETAILED*

☐

MEDICAL EXPENSES

- (OOP) INSURANCE PREMIUMS
- PRESCRIPTIONS
- DENTIST/DOCTORS
- EYEGLASSES/CONTACTS
- NURSING HOME/REHAB
- MISC.

***** ALL MEDICAL DEDUCTIONS MUST EXCEED 7.5% OF ADJUSTED GROSS INCOME. TIP - USE YOUR GROSS INCOME, IF IT IS CLOSE TO 7.5% INCLUDING THE MEDICAL OUT-OF-POCKET EXPENSE.**

☐

TAXES

- REAL ESTATE TAXES
- STATE/PERSONAL
- SALES TAX/LARGE PURCHASES

☐

INTEREST PAID

- MORTGAGE
- 2ND MORTGAGE (HOME)
- HOME EQUITY LOANS
- STUDENT LOANS
- INVESTMENT INTEREST

☐

EDUCATIONAL EXPENSES

- 1098-T
- BOOKS/SUPPLIES

1201 North Third Street Jacksonville Beach, Florida

(904) 241-0050 Fax (904) 241-0752 taxadvantage@taxadvantage.org