



**SUMMARY OF INCOME AND JOB-RELATED EXPENSES – page 2 of 4**

**SOURCES OF INCOME (3)**

Salaries & Wages from W-2	\$	_____
Non-Employee Comp. (1099)	\$	_____
Interest Income	\$	_____
Dividend income	\$	_____
Refund of state and local taxes	\$	_____
Alimony received	\$	_____
IRA distributions received	\$	_____
Gambling Winnings (W2-2G)	\$	_____
Unemployment compensation	\$	_____
Social Security received	\$	_____
Other income	\$	_____
<b>Total Income</b>	\$	_____

**MEDICAL & DENTAL EXPENSES (A)**

Health Insurance Premiums	\$	_____
Long Term Care Premiums	\$	_____
Medical Miles		_____
Other Medical Expenses	\$	_____
• (RX, Doctors, Labs, Co-Pays, etc.)	\$	_____
<b>Total Medical Expenses</b>	\$	_____

**TAXES PAID**

Income Taxes – Local/State	\$	_____
General Sales Tax – Local/State	\$	_____
Real Estate	\$	_____
Other Taxes	\$	_____
<b>Total Taxes Paid</b>	\$	_____

**INTEREST PAID**

1098 Mortgage Interest/Points	\$	_____
Unreported Points	\$	_____
<b>Total Interest Expenses</b>	\$	_____

**GIFTS TO CHARITY** (Receipts required on \$250+ giving)

Gifts by cash or check	\$	_____
Church Name: _____	\$	_____
Other than cash or check	\$	_____
<b>Total Gifts to Charity</b>	\$	_____

**UNREIMBURSED EMPLOYEE EXPENSES (20)**

Uniforms and Shoes	\$	_____
Small Tools and Equipments	\$	_____
Business Telephone	\$	_____
Cont. Ed., Books & Union Dues	\$	_____
Job Supplies & Subscriptions	\$	_____
Other Expenses (specify)	\$	_____
<b>Total Job-Related Expenses</b>	\$	_____

**Tax Preparation Fees**

	\$	_____
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**OTHER EXPENSES (22)**

Legal Fees	\$	_____
IRA & Investment Fees	\$	_____

**OTHER MISC. DEDUCTIONS (27)**

Gambling Losses	\$	_____
Declared - Gambling Winnings	\$	_____
<b>Total Misc. Deductions</b>	\$	_____

**EMPLOYEE BUSINESS EXPENSES (2106)**

Park, tolls and transportation	\$	_____
Travel away from home	\$	_____
Other business expense	\$	_____
Meals & Entertainment	\$	_____
<b>Total Employee Expenses</b>	\$	_____

**MILEAGE INFORMATION (2106)**

Date placed in service	_____
Total mileage for year	_____
Business miles <small>do not include personal miles</small>	_____
Daily Commuting miles	_____
<b>Total Commuting Miles</b>	_____

**ACTUAL EXPENSES (2106)**

Taxes	\$	_____
Gas, oil, insurance, repairs, etc.	\$	_____
Car rentals or Car lease	\$	_____
<b>Total Actual Expenses</b>	\$	_____
Other Business Car Expenses	\$	_____

Prepared By \_\_\_\_\_ Date \_\_\_\_\_