

ANGEL & COOK, LLC
INCOME TAX INFORMATION WORKSHEET
2024

Your Name: _____ SSN: _____ Birth date: _____
 Drivers License #: _____ Issue Date: _____ Expire date: _____

Spouse's Name: _____ SSN: _____ Birth date: _____
 Drivers License #: _____ Issue Date: _____ Expire date: _____

The following section does not need to be completed unless there are additions or changes or you are a new client to our firm.

Dependent 1: _____ SSN: _____ Birth date: _____
 Dependent 2: _____ SSN: _____ Birth date: _____
 Dependent 3: _____ SSN: _____ Birth date: _____
 Dependent 4: _____ SSN: _____ Birth date: _____

Home Address: _____
 City: _____ St: _____ Zip Code: _____
 Home Phone: _____ Cell Phone: _____ Email Address: _____

*******IF YOU HAVE INCOME FROM ANY OF THE FOLLOWING, PLEASE FURNISH DETAILED INCOME/EXPENSE AMOUNT*******

INCOME SOURCES (PROVIDE ALL RELATED TAX FORMS):

| | | | |
|--------------------------------------|----|--|----|
| Wages (W-2s)..... | \$ | Royalties (1099s)..... | \$ |
| Interest/Dividends (1099s)..... | \$ | Partnership (Sch. K-1)..... | \$ |
| Brokerage Transactions (1099's)..... | \$ | Estate/Trust (Sch. K-1)..... | \$ |
| Commissions/Fees (1099s)..... | \$ | Sub-S Corporation (Sch. K-1)..... | \$ |
| Farm Income/Expense (1099s)..... | \$ | Alimony Received..... | \$ |
| Business Income (1099s)..... | \$ | Unemployment..... | \$ |
| Sales of Assets/Investments..... | \$ | Social Security (1099-SSA)..... | \$ |
| Pension/Annuities (1099-R)..... | \$ | Other(Ex:BitCoin, AirBNB, Turo, Etsy, Ebay, Uber, 1099-K etc)..... | \$ |
| Rents (1099s)..... | \$ | | |
| 3rd Recovery Rebate Credit..... | \$ | | |

PRE-AGI DEDUCTIONS:

| | | | |
|--------------------------------------|----|--|----|
| IRA/ROTH Contributions..... (You) \$ | \$ | Educator Expense..... | \$ |
| (Sp) \$ | \$ | HSA Contribution..... | \$ |
| Student Loan Interest Paid..... | \$ | Alimony & SSN..... | \$ |
| Education | \$ | Charity up to \$300 (S) \$600 (MFJ)..... | \$ |

SALE OF REAL ESTATE:

Description (1099-S): _____
 Sale Date: _____ Gross Proceeds: \$ _____ Purch. Date: _____ Cost Basis: \$ _____

ITEMIZED DEDUCTIONS:

| | |
|--|----|
| Medical/Dental: Health Insurance..... | \$ |
| Long-term Care Insurance..... | \$ |
| Prescription Drugs..... | \$ |
| Doctors/Hospitals..... | \$ |
| Nursing Homes..... | \$ |
| Eye Glasses/Dentures/Braces..... | \$ |
| Lodging Expense on Medical Trips..... | \$ |
| Personal Medical Mileage (# of Miles)..... | \$ |

ITEMIZED DEDUCTIONS (Continued):

Taxes: Residential Real-Estate..... \$ _____
 Personal Property (Vehicles)..... \$ _____
 Other Taxes..... \$ _____
 Balance Due on State Prior Returns..... \$ _____
 Sales Tax Paid (Vehicle/Boat Purchase)... \$ _____
 Interest: Home Mortgage Interest (1098)..... \$ _____
 Mortgage Insurance Premiums (1098)..... \$ _____
 Contributions: Checks/Cash with Receipts..... \$ _____ (Please provide receipts)
 Other than Cash..... \$ _____ (Please provide detail)
 Charitable Auto Mileage (# of Miles)..... _____

CHILD CARE:

Name of Provider: _____ SSN: _____ \$ _____
 Address: _____ City: _____ ZIP: _____
 Name of Provider: _____ SSN: _____ \$ _____
 Address: _____ City: _____ ZIP: _____
 Name of Provider: _____ SSN: _____ \$ _____
 Address: _____ City: _____ ZIP: _____
 Dependant 1 Child Care Expense Total: \$ _____ Dependant 3 Child Care Expense Total: \$ _____
 Dependant 2 Child Care Expense Total: \$ _____ Dependant 4 Child Care Expense Total: \$ _____

FEDERAL/STATE ESTIMATED TAX PAYMENTS:

#1 Date: _____ Federal: \$ _____ State: \$ _____
 #2 Date: _____ Federal: \$ _____ State: \$ _____
 #3 Date: _____ Federal: \$ _____ State: \$ _____
 #4 Date: _____ Federal: \$ _____ State: \$ _____

EDUCATION CREDITS/DEDUCTION (AMERICAN OPPORTUNITY, LIFETIME LEARNING) (1098-Ts):

Student: _____
 College Institution _____
 Amounts PAID for Tuition and Fees..... \$ _____
 Amounts PAID for Course Materials..... \$ _____
 Amounts RECEIVED from Scholarships or Grants..... \$ _____

COMPLIANCE QUESTIONS:

Does T/P have any foreign accounts?..... _____ Is T/P claimed as a dependent on another return?..... _____
 If yes, over \$10,000?..... _____ Any household labor earning over \$1000?..... _____
 Did T/P Refinance home in 2020?..... _____ Any IRS letters rcvd?..... _____
 If yes, need closing statement and use of funds.... _____ Any State letters recvd?..... _____
 At any time during 2022, did you receive, sell, exchange, or otherwise dispose of any financial interest in virtual currency? yes no
 If yes, provide date(s) and price(s) when received/purchased and date(s) and selling price on sell/disposal. (Attach separate sheet.)

OTHER QUESTIONS/COMMENTS:

