GENERAL TAX WORKSHEET -- Tax Year:__________ SCG&E, PLLC

Name	DOB:		Social Security Number	Student
Husband:				Yes: □ No: □
Wife:				Yes: □ No: □
Dependent:				Yes: □ No: □
Dependent:				Yes: □ No: □
Dependent:				Yes: □ No: □
Dependent:				Yes: □ No: □
Phone:		**Address:**		
Email:		Email Return (Circle One): YES NO		

FOR DIRECT DEPOSIT OF TAX REFUND

Checking: □ Savings: □		Name of Bank:
Routing Number:		Account Number:

OTHER REQUIRED INFORMATION

Did you exchange any cryptocurrency?	Yes: □ No: □		Do you have funds in a foreign bank account?	Yes: □ No: □

ESTIMATES

Federal Estimated Tax Payments	Paid		Iowa Estimated Tax Payments	Amount Paid

ITEMIZED DEDUCTIONS

Medical & Dental	**Amount**		**Charitable Contributions**	**Amount**
Health Insurance Premiums (supplement only)			Total paid by check/receipt	
Long Term Care Insurance (husband)			Non-cash:	
Long Term Care Insurance (wife)			Charitable Miles	mi
Medical Out of Pocket Expenses			**Iowa Dependents Tuition/Books**	**Amount**
Medical Mileage	mi		Tuition at private school	
Less: Insurance reimbursement			Cost of Books & Education Materials	
Taxes	**Amount**		Athletic and Extra Curricular Activities	
Personal Residence Property Taxes			Drivers Ed through school	
Vehicle License fees			**K-12 Teacher Expense**	
Sales tax paid on purchased vehicle(s)			**College Education Expenses for Dependents**	**Amount**
Interest	**Amount**		Tuition	
Home Mortgage paid to Financial Inst			Books/Materials	

CHILD CARE EXPENDITURES

Provider & EIN/SSN Numbers	Name of Child	Amount

CONTRIBUTIONS TO RETIREMENT ACCOUNTS

TYPE (Traditional/SEP IRA, Roth IRA,	Amount

Taxpayers claiming the Earned Income Credit: Please note that we must now follow rules of due diligence in determining whether a child claimed by you for te credit is your qualifying child and not that of another person. The IRS May audit your return and our files. We will complete Form 8867 with you.

PLEASE BRING THESE ITEMS

- W-2's
- Documentation to show any child support or alimony received
- 1099's (interest, dividends, sale of stock, misc income, rent income)
- 1099's from USDA and COOP Patronage Dividends
- 1098's (mortgage interest expense, student loan interest, student tuition expenses)
- Social security benefit and unemployment compensation statements
- All supporting documents concerning reirement plan contributions and distributions
- K-1's from pass-through entities
- ALL TAX FORMS/ CORRESPONDENCE RECEIEVED FROM THE GOVERNMENT