

**CAPITAL GAINS & LOSSES: (ATTACH 1099B & STOCKBROKERS' STATEMENTS)**

**SALE OF STOCK AND SECURITIES:**

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES AMOUNT	COST
SHORT TERM CAPITAL LOSS CARRYOVER FROM PRIOR YEAR				
LONG TERM CAPITAL LOSS CARRYOVER FROM PRIOR YEAR				
CAPITAL GAIN FROM DIVIDEND SECTION				
<b>TOTAL</b>				

**OTHER INCOME: (ATTACH FORMS 1099R, 1099G, 1099MISC, SSA-1099, 1099-C, W2-P, K-1, ETC.)**

STATE TAX REFUND PAID		SOCIAL SECURITY BENEFITS		
ALIMONY RECEIVED		SOCIAL SECURITY WITHHOLDING		
UNEMPLOYMENT COMPENSATION		SOCIAL SECURITY BENEFITS SPOUSE		
GAMBLING WINNINGS		SOCIAL SECURITY WITHHOLDING		
	<b>DISTRIBUTED</b>	<b>TAXABLE</b>	<b>FEDERAL W/H</b>	<b>STATE W/H</b>
PENSION				
PENSION				
PENSION				
PENSION				
PENSION				
IRA INCOME				
IRA INCOME				
IRA CONVERTED TO ROTH IRA				

**SALE OF REAL ESTATE: (HAVE ESCROW PAPERS & LIST OF IMPROVEMENTS)**

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES AMOUNT	COST

**ROYALTIES:**

NAME	AMOUNT	TAXES	OTHER EXPENSES

**ADJUSTMENTS TO INCOME:**

	TAXPAYER	SPOUSE
REGULAR IRA CONTRIBUTION		
ROTH IRA CONTRIBUTION		
KEOUGH / SEP CONTRIBUTION		
INTEREST FORFEITED ON CLOSING A TIME DEPOSIT		
ALIMONY PAID TO: _____ SSN _____		
529 EDUCATION PLAN CONTRIBUTIONS (ARIZONA DEDUCTION ONLY)		
EDUCATOR EXPENSES-TEACHER,AIDE,COUNSELOR, K-12 (900 HOURS)		
HEALTH SAVINGS ACCOUNT CONTRIBUTION (NOT MEDICAL FLEX PLAN)		