

## 3435 CAMINO DEL RIO SO. SUITE 319 SAN DIEGO, CA 92108

<u>www.cmbetaxservices.com</u> <u>cmbetaxservices@cox.net</u> (619) 449-1040

NAME (please prin	t):							
ADDRESS:	CITY:	ST.	ATE:	ZIP:				
HOME PHONE: ()				BUSINESS PHONE: ()				
DATE OF BIRTH (	TAX PAYER	R):/	/	D	ATE OF BII	RTH (SPOUSE	(i):/	/
FORM:		EARNED IN	NCOME CR	EDIT: \$	l	RETIREMENT	CREDIT: \$	
FILING STATUS:	Single	☐ Married	filing joint	☐ Married fi	ling separate	e Head of	household	
	Full	Name			Birthdate	e	Social Secuity	, #
Tax Payer				readt/hh/78			<u> </u>	
Spouse					/_	/		
Depen Name i		Birth	ndate	Social Secu	rity #	Relationship		Months at Home
		/_	/		-			
		/_		-	-			
		/	/		-			
			/					
# OF CHILDREN A	T HOME:	# OF	CHII DREN	I NOT AT HO	ME:	OTHERS:		
STATE TAX REFU CHILD / DEPENDI PROVIDER ADDR	ENT CARE E	EXPENSES: S	S	CARE				
WAGES, SALARI  TAXPAYER: R	ETIREMENT	CONTRIBU	JTION: \$	ı		NG WINNING	_	_
Salary & Wages	Fed Withheld	FICA	SDI	State Withheld	Interest Income	Dividend Income	Retirement Income	Taxable Amt
1.\$	\$	\$	\$	\$	\$	\$	\$	\$
2.\$	\$	\$	\$	\$	\$	\$	\$	\$
3.\$	\$	\$	\$	\$	\$	\$	\$	\$
4.\$	\$	\$	\$	\$	\$	<u>\$</u>	\$	\$
ALIMONY PAID:\$  SPOUSE: RET	IREMENT C				 GAMBLING	WINNINGS: \$	S	
Salary & Wages	Fed Withheld	FICA	SDI	State Withheld	Interest Income	Dividend Income	Retirement Income	Taxable Amt
1.\$	\$	\$	\$	\$	\$	\$	\$	\$
2.\$	\$	\$	\$	\$	\$	\$	\$	\$
3.\$	\$	\$	\$	\$	\$	\$	\$	\$
4.\$	\$	\$	\$	\$	\$	\$	\$	\$

## **DEDUCTIONS**

MEDICAL EXPENSE	TAX EXPENSE	
Medicine, Drugs & Insulin	\$ Real Estate Taxes	\$
Total Doctors, Dentist, etc	\$ Auto License Fees	\$
Glasses	\$ State Tax for Prior Year	\$
Hearing Aids and Batteries	\$ TOTAL TAX EXPENSE	\$
TOTAL MEDICAL EXPENSES	\$	

<u>CONTRIBUTIONS</u>	INTEREST EXPENSES	
House of Worship	\$ (If residence refinanced or second	
	 obtained, bring details)	
Payroll Deductions	\$ Home Mortgage Payments to Bank	\$
Non-Cash Contributions	\$ Home Mortgage Payments to Individual	\$
Charity	\$ Name:	
Travel (miles x .14)	\$ Address:	
TOTAL CONTRIBUTIONS	\$ TOTAL	\$

MISCELLANEOUS DEDUCTIONS		RENTAL INCOME & EXPENSES	
Union Dues	\$	Address of Properties:	
Tax Preparation Fee	\$	A.	
Business Telephone	\$	B.	
Job Seeking Expenses	\$	C.	
Work Tools	\$	Rent Received:	\$
Safe Deposit Box	\$	Royalties Received:	\$
Prof. Subscription & Societies	\$	Rental Expenses:	\$
Laundry & Uniforms	\$	Advertising:	\$
Investment Expenses	\$	Auto & Travel:	\$
Lottery / Gambling Losses	\$	Cleaning & Maintenance:	\$
Others	\$	Insurance:	\$
TOTAL MISC DEDUCTIONS	\$	Legal/Professional Fees:	\$
		Mortgage Interest Paid To Bank:	\$
TRAVEL		Other Interest:	\$
# OF MILES	MILES	Repairs:	\$
X 0.22		Supplies:	\$
TOTAL	\$	Utilitie:	\$
		Wages & Salaries:	\$
		Taxes:	\$
		Other:	\$
		TOTAL RENTAL EXPENSES	\$

AUTOMOBILE EXPENSE: If you used your car on the job or had other job-related expenses, describe briefly (skip this section if the only expenses you incurred were driving to and from work.)

	Miles		Amount		Amount
Total Miles Driven		Gas, etc.	\$	Miscellaneous	\$
Total Bus Miles		Insurance	\$	Repairs	\$
Total Commute Miles		Interest	\$	Interest	\$
Daily Round Trips		Tires, Batteries	\$	License Fees	\$
				Other	\$
				TOTAL AUTO EXPENSES	\$

Do you have a business?	☐Yes ☐No
Do you have the profit and loss from the business?	□Yes □No
Did you sell any stock this year?	□Yes □No