

Personalized Tax Map 2019



To request your personalized Tax Map, please complete this form and send it to our office. We offer this service at **NO COST** to you. This Tax Analysis is for educational purposes only. Please consult your tax advisor. *If you have benefited from this analysis, please refer a friend who can also benefit from our services...*

Client		Spouse	
Full Name:			
Birthdate:			
Phone:			
Email:			
Filing Status:	<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household
Tax Year:		Inflation Rate:	

TAX FORM INFORMATION	Enter Dollars
Earned Income: (1040: line 1)	
Ordinary Income: Combine the following (1040: line 2B + (1040: Line 3B - 1040: Line 3A) + Schedule 1: Line 1 + 2A + 7 + 21)	
IRA Distributions or Pensions: (1040: line 4B + 4D)	
Long Term Cap. Gains: (Schedule D: Line 15, If no Schedule D, use 1040: Line 6)	
Short Term Cap. Gains: (Schedule D, line 7)	
Qualified Dividends: (1040: line 3A)	
Tax-Free Interest: (1040: line 2A)	
Social Security: (1040: line 5A)	
SELF EMPLOYMENT	
All self-employment income should also be entered as either Specified Service Business Income or Qualified Business Income. BUT DO NOT COUNT INCOME AS BOTH.	
Self-Employment Income: If long schedule SE is used, enter line 9, for short form, enter line 3	
Specified Service Business Income: (Schedule 1 Lines 3 + Line 5)	
Qualified Business Income: (Schedule 1 Lines 3+ Line 5 + Line 6)	

DEDUCTIONS	Enter Dollars
Above-the-Line Deductions: (Schedule 1: line 22 - (Line 14 + 15 + 19))	
IRA/Plan Contributions: (Schedule 1: lines 15+19)	

NOTE: Schedule A – Itemized Deductions (see next page)

Schedule A – Itemized Deductions:		Enter Dollars
Medical and Dental Expenses		
	1 – Medical and Dental Expenses	
Taxes You Paid:		
	5A – State and Local Taxes:	
	5B – Real Estate Taxes:	
	5C – Personal Property Taxes:	
	6 – Other Taxes:	
Interest You Paid		
	8A – Home mortgage Interest and Points reported on Form 1098:	
	8B – Home Mortgage interest not reported on Form 1098:	
	8C – Points not reported to you on Form 1098:	
	9 – Investment Interest:	
Gifts to Charity		
	11 – Gifts by cash or check:	
	12 – Other than cash or check:	
	13 – Carryover from prior year:	
Casualty and Theft Losses		
	15 – Casualty or theft loss(es):	
Other Itemized Deductions		
	16 – Other Itemized Deductions:	

The TAX MAP will illustrate a potential benefit of taking additional Qualified IRA or Non-Qualified funds prior to the end of the calendar year using last years taxes as an example. Please check with your CPA prior to making such final decisions. This software is for educational purposes only. We do not offer any tax advice.

**SUBMIT YOUR FORM TO OUR OFFICE WHEN COMPLETED
AND RECEIVE YOUR **FREE** TAX MAP ANALYSIS**

Corbin Lindsey
 Direct (360) 722-7889
 Fax # (425) 412-6865
 corbin@birdseyefinancial.com
 www.birdseyefinancial.com

Birdseye Financial
 1402 7th Street, Ste B
 Marysville, WA 98270



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