

Personalized Tax Map



To request your personalized Tax Map, please complete this form and send it back to our office. We offer you this service at no cost or obligation for your benefit. We believe that once you experience our level of service and expertise, you would request our help in optimizing your retirement plans... **Please refer a friend too...**

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: (1040: lines 2B, ordinary dividends, (subtract 3A-3B), Schedule 1 (Add Lines 10, 11, 19, 21)	
IRA Distributions: (1040: line 4B)	
Long Term Cap. Gains: (Schedule D, Line 15, If no Schedule D, Line 13 Schedule 1)	
Short Term Cap. Gains: (Schedule D: line 7)	
Qualified Dividends: (1040: line 3A)	
Pensions: (1040: line 16b)	
Tax-Free Interest: (1040: line 2A)	
Social Security: (1040: line 5A)	
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: (1040: Lines 12, 17)	
Qualified Business Income: (Schedule 1: lindse 12, 17, 18)	

DEDUCTIONS	Enter Dollars
Above-the-Line Deductions: (Schedule 1: line 36 minus lines 27,28,32)	
IRA/Plan Contributions: (Schedule 1: lines 28,32)	

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	
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):	

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**



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