

## Federal Income Tax – Selected Historical Information

	2004	2005	2006	2007	2008
Type of return – single/ joint					
Date filed					
Return prepared by:					
<b>Income items</b>					
• Wages					
• Dividends					
• Interest					
• Long term capital gains					
• Short term capital gains					
• Retirement plan income					
• Business income					
• Other income					
<b>Adjusted gross income</b>					
<b>Deduction items</b>					
• Mortgage interest					
• Other interest					
• Property taxes					
• State income taxes					
• Other taxes					
• Charitable contributions					
• Deductible medical exp.					
• Other deductions					
<b># Exemptions claimed</b>					
<b>Taxable income</b>					
<b>Regular income tax</b>					
<b>Alternative minimum tax</b>					
<b>Self employment tax</b>					
<b>Total tax</b>					
<b>Taxes withheld</b>					
<b>Estimated taxes paid</b>					
<b>Taxes due (refund)</b>					

Tax return preparer name and contact information \_\_\_\_\_

Tax advisor name and contact information \_\_\_\_\_