

JEFF PINKNEY CPA, INC.
CERTIFIED PUBLIC ACCOUNTANTS

Phone: (785) 628-3811 | Web: www.jeffpinkneycpa.com
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INDIVIDUAL INCOME TAX WORKSHEET - Tax Year 2025

Name: _____

Income (Wages, Interest, Retirement, Etc) Please provide all W2's, 1099s, and other items received for the current tax year

Estimated Taxes paid

	<u>Date Paid</u>	<u>Federal</u>	<u>State</u>
1st Qtr - Due 4-15	_____	_____	_____
2nd Qtr - Due 6-15	_____	_____	_____
3rd Qtr - Due 9-15	_____	_____	_____
4th Qtr - Due 1-15	_____	_____	_____

Itemized Deductions

Medical Expenses (out of pocket):

Prescriptions/Drugs _____
Doctors/Dentists _____
Hospital/Nursing _____
Insurance Premiums _____
Long-Term Care (T) _____
Long-Term Care (S) _____
Medical Lodging _____
Medical Mileage _____

Taxes:

Real Estate (Home) _____
Prop Tax (Vehicles) _____
Prop Tax (Other) _____
Sales Tax (Vehicles) _____

Interest You Paid:
Home Mortgage _____
**Enclose Form 1098 _____
Investment Interest _____

Contributions:

Cash or Check _____

Non-Cash Contributions _____
Charitable Miles _____

Other Expenses

Teaching Exp _____
Student Loan Int _____
**Enclose Form 1098-E

New Vehicle Loan Int _____
**New vehicles purchased after 1/1/25 only.
Applies to non-business vehicles assembled in US

Gambling Income/Expense

Winnings _____
Losses _____
(Include all W-2G's)

Make/Model VIN

Daycare/Preschool Expense

	<u>Child 1</u>	<u>Child 2</u>	<u>Child 3</u>
Child Name	_____	_____	_____
Amount Paid	_____	_____	_____
<u>Name and Address of Daycare Provider (s)</u>	<u>Providers EIN/SSN</u>	<u>Amount Paid</u>	
_____	_____	_____	
_____	_____	_____	

Education Credits

	<u>Student 1</u>	<u>Student 2</u>
Student/Dependent Name	_____	_____
Tuition Paid (net after scholarships)	_____	_____
Books/Supplies/Computer required to be purchased from the institution	_____	_____

Note: Please include a Form 1098-T or other Tuition statements and documentation to support the tuition credits.

The credit is based upon amount "**paid**", not what was billed.

IRA Contributions

	<u>Taxpayer</u>	<u>Spouse</u>
Amount contributed to Traditional IRA	_____	_____
Amount contributed to Roth IRA	_____	_____

If eligible, are you considering contributing to an IRA before April 15? Yes _____ Amount _____