

**JEFF PINKNEY CPA, INC.  
CERTIFIED PUBLIC ACCOUNTANTS**

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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)	_____

Contributions:

Cash or Check	_____
Non-Cash Contributions	_____

Interest You Paid:

Home Mortgage	_____
**Enclose Form 1098	_____
Investment Interest	_____

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**

Child 1

Child 2

Child 3

Child Name	_____
Amount Paid	_____
<u>Name and Address of Daycare Provider (s)</u>	_____
_____	_____
_____	_____

Providers EIN/SSN

Amount Paid

**Education Credits**

Student 1

Student 2

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**

Taxpayer

Spouse

Amount contributed to Traditional IRA	_____
Amount contributed to Roth IRA	_____

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