



# MEYER ACCOUNTING & TAX LLC

Creative Financial Solutions

## PERSONAL INFORMATION CHANGES

## DEPENDENTS

(Name, SSN, DOB)

## INCOME

Job Income	W-2	<input type="text"/>
Interest /Dividends	1099 Int/Div	<input type="text"/>
Stock Sales	1099 B	<input type="text"/>
Retirement	1099 R	<input type="text"/>
Social Security	1099 SSA	<input type="text"/>
Gambling	W-2 G	<input type="text"/>
Cancellation of Debt	1099 A or C	<input type="text"/>
Unemployment	1099-G	<input type="text"/>

## Business Income - Sch C / F / E

Income	<input type="text"/>
Expense	<input type="text"/>

(Provide Summarized List)

Other Income	<input type="text"/>
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## IRA CONTRIBUTIONS

Taxpayer	<input type="text"/>
Spouse	<input type="text"/>

## DEDUCTIONS

### Medical (7.5%) and (10%)

Health Insurance	<input type="text"/>	*
Long Term Care	<input type="text"/>	*
Medcial Costs	<input type="text"/>	

Not if withheld from you Paycheck

Not amounts Paid with Flex or HAS

### Taxes (Paid in 2013)

Real Estate	<input type="text"/>	*
Personal Property	<input type="text"/>	
Sales Tax	<input type="text"/>	

County and City

Big Purchase Items

### Mortgage Interest

### Charitable Giving (Need Copies of Receipts from Organization)

Cash	<input type="text"/>
Non-Cash	<input type="text"/>

If over \$500, must also have detailed listing

### Miscellaneous Itemized Deductions

Business Expenses	<input type="text"/>
Railroad / Transporation	<input type="text"/>
Gamling Losses	<input type="text"/>
Other	<input type="text"/>

Union Dues, Days on Road, Etc

Need statement from Casino or Log

## EDUCATION EXPENSES

## CHILDCARE / DAYCARE

1098 T from institution, Receipts for Books

Need Providers information

**Meyer Accounting Tax**  
**205 N Jefferson, Kearney MO 64060**  
**(816) 628-4258**