DEPENDENTS

CHANGE ONLY

Social Security #s are MANDATORY

▼ ** C–Child, R–Relative, O–Other

IRS MATCH

First Name	Last Name (If Different)	Social Security# (Mandatory)	**	Months In Home (This Home)	Birth Date	If over the age of 18	
						Income	✓ If Student

INTEREST INCOME

IRS MATCH

IRS computer matches payer and amount. Always use payer name listed on 1099 even if not the original source.

LINE #	Name of Payer Please provide all forms 1099INT & 10990ID	Banks, Credit Union, Corporate, Bonds, etc.	Seller Financed Mortgages Name,address & SS# required	Direct U.S. Obligations Savings Bonds, T-Bills, etc. (State tax free)	Home State Municipal Bonds (Generally tax free)	Other State Municipal Bonds (Federal tax free)
1						
2						
3						
4						
5						
6						
7						
8						
9	Name: SS#:			Payor Address:		
10	Name: SS#:			Payor Address:		
11	FORFEITED INTEREST (Early Withdrawals)		Federal Tax Withheld on Int/Div			

DIVIDEND INCOME

IRS MATCH

IRS computer matches payer and amount. Always use payer name listed on 1099 even if not the original source. Some institutions use substitute 1099s, and caution must be used in separating the various types of dividends.

LINE #	Name of Payer Please provide all forms 1099 DIV	Foreign Taxes Paid	Ordinary	Qualified Portion*	Capital Gains	Source U.S. Obligations Savings Bonds, T-Bills etc. (State tax free)	Taxable to State only	Non-taxable State and Federal
1								
2								
3								
4								
5								

** The amount in the "Ordinary" column will include the "Qualified" dividends shown in the "Qualified Portion" column. The portion of the ordinary dividends that are qualified receive special tax treatment*

STOCK & OTHER ASSET SALES

IRS MATCH

IRS matches gross proceeds from sale using the 1099B. Many brokerage houses use substitute forms. All transactions must be reported even if there is no profit. The IRS computer has the sales price but not cost.

LINE #	Description	Acquisition Date MM/DD/YR	Sales Date MM/DD/YR	Gross Proceeds From Sale (For stocks use net after commission)	Cost or Other Basis	Net Profit or Loss (Information only)
1						
2						
3						
4						
5						