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Tax Plus

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Ministers: Please complete ALL Sections.
Other Taxpayers: Please complete all sections EXCEPT (2)

(1)	Personal Information: Name, address, date of birth, SS# , Cell Phone and Email address	**Name:** **Address:** **SS#:** **DOB:** **Cell phone:** **Email:**	
	Spouse (Same information as above)	**Name:** **Address:** **SS#:** **DOB:**	

		Cell phone: **Email:**	
	How many dependents:(children or other?) Names, SS#, and date of birth for each dependent: **Section (2) is FOR MINISTERS AND SALESMEN ONLY:**		
(2)	**Parsonage information: Very Important**:		
	Parsonage worksheet (Can be downloaded from the website) www.taxplusfinancialservices.com		
	Tax Summary worksheet (Please call and get it from your Conference)		
	Mileage Information: (Very important)		
	Total miles put on car for the year		
	Total business miles for the year. (example: visiting members, conference, camp, other ministry trips, etc)		
	Daily commuting miles (from home to church one way)-this is not deductible.		
	The number of trips you made to the church for the year (not deductible)		
	How many cars do you have?		
	When did begin using your car for ministry?		

	Make and year of your vehicle (s)		
	Vehicle Actual Expense information:		
	Insurance	$	
	Gas	$	
	Tires	$	
	Tune ups and repairs	$	
	Tolls	$	
	Car wash	$	
	Car Lease	$	
	Other deductions:		
	Dry cleaning	$	
	New Robes, Special clothing, etc	$	
	Special Overnight Trips (e.g.: G.C, Evangelism council, car rentals, hotels, parking, etc)	$	
	Parking	$	
	Telephone and Internet	$	
	Cell phone	$	
	Association dues and Ministerial fees	$	
	Bibles, Books, CD's, tapes, etc	$	
	Office items	$	
	Postage	$	
	Miscellaneous	$	
(3)	**Charitable:** Indicate names of organizations and Amounts	$	

	Tithe and offering Names of church and amount	$	
	Charitable Miles Spouse' miles to Board Meeting, chior, conventions, where she/he volunteers.		
(4)	**Medical:**		
	Doctors	$	
	Dental	$	
	Prescriptions	$	
	Co-Payments	$	
	Medical Insurance: (Aflac, etc)	$	
	Other	$	
(5)	**Mortgage: (If applicable)**		
	1098 from the mortgage company	$	
	Real Estate taxes	$	
	School or College		
	1098 T from the college		
	Official documents:		
	W2's		
	1099's from banks		
	1098 E from student loans		
	1099 R from retirement company		
	1099 dividends		
	IRA documents if applicable		
	Copy of SS card and DL for each person if		

	applicable)		
	1099 SSA from social security administration		
	Other Information:		
	Describe anything else you need me to know		
(6)	**Copies needed:**		
	Copies of picture ID of you and spouse,		
	Copies of SS Cards of you, spouse, and dependents. Copies of Last years tax returns (if you are a New Client)		
	Other: Deductions		
	Any other deductions you can think about.		
	Describe Any changes from last year:		
	(e.g., Bought new car or house, or a child born, or you got married)		

Describe any circumstance you want me to know :

Do You Have Any Questions?: