

**PERSONAL TAX WORKSHEET**

ESTIMATED TAX PAYMENTS		AMT.	CHK #	INTANGIBLE TAXES			NOTES
PAYMENT	DATE PD.				DATE PD	AMOUNT PD.	
#1							
#2				<b>KEEP DECEMBER MONTH END STATEMENT FOR CURRENT YEAR TAXES AND SEND TO THE OFFICE UPON RECEIPT IN JANUARY</b>			
#3							
#4							

PURCHASE AND SALE OF INVESTMENTS							NOTES
COMPANY OR FUND NAME	DTE PURCH	PURCH AMT	NO.OF SHRS	DATE SOLD	GROSS SALE	NO.OF SHRS	
1							
2							
3							
4							
5							
6							
7							
8							

2ND SENIOR HOMESTEAD EXCEPTION			DATE SENT	NOTES	
					<b>MUST RENEW YEARLY FOR 2nd SENIOR EXCEPTION (OVER 65 YRS OF AGE)</b>
SEND TO WILLIAM MARKHAM					

RENTAL INCOME & EXPENSES							NOTES
ADDRESS OF PROPERTY	INC./MO.	R/E TAXES	MORT. INT.	IMPROV'MNT	MILEAGE		

CHRITABLE CONTRIBUTIONS	DATE PD	AMOUNT PD.	DATE PD	AMOUNT PD.	DATE PD	AMOUNT PD.	NOTES

OTHER INCOME & EXPENSES	RECEIVED	BANK, CREDIT UNION OR BROKERAGE		COMPANY OR FACILITY		NOTES
INTEREST INCOME (1099-INT)						
DIVIDEND INCOME (1099-DIV)						
GROSS PROCEEDS (1099-B)						
W-2'S FROM ALL JOBS						Include Soc. Sec. Statement
CHILD CARE EXPENSE						
SPOUSE SS NO.		SS NUMBER:				
DOB & SS NO. OF NEW BORN		SS NUMBER:		DOB:		
MEDICAL EXPENSES	Doctor: _____		Dentist: _____		Prescrip: _____ Other: _____	