

Federal Income Tax – Selected Historical Information

	2015	2016	2017	2018	2019
Type of return – single/ joint					
Date filed					
Return prepared by:					
Income items					
• Wages					
• Dividends					
• Interest					
• Long term capital gains					
• Short term capital gains					
• Retirement plan income					
• Business income					
• Other income					
Adjusted gross income					
Deduction items					
• Mortgage interest					
• Other interest					
• Property taxes					
• State income taxes					
• Other taxes					
• Charitable contributions					
• Deductible medical exp.					
• Other deductions					
# Exemptions claimed					
Taxable income					
Regular income tax					
Alternative minimum tax					
Self employment tax					
Total tax					
Taxes withheld					
Estimated taxes paid					
Taxes due (refund)					

Tax return preparer name and contact information _____

Tax advisor name and contact information _____