

**PRELIMINARY TAX RETURN WORKSHEET**

**TAX YEAR** \_\_\_\_\_

INCOME

Salaries and Wages \_\_\_\_\_

Interest and Dividends \_\_\_\_\_

Business Profit (Loss) \_\_\_\_\_

Net Capital Gain (Loss) \_\_\_\_\_

Taxable Pension/IRA Distributions \_\_\_\_\_

Net Rental Gain (Loss) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TOTAL INCOME \_\_\_\_\_

ADJUSTMENTS TO INCOME

IRA Contributions \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TOTAL ADJUSTMENTS ( \_\_\_\_\_ )

ADJUSTED GROSS INCOME \_\_\_\_\_

ITEMIZED DEDUCTIONS

Medical Deductions \_\_\_\_\_

    Less 7½% AGI \_\_\_\_\_

State and Local Taxes \_\_\_\_\_

Interest \_\_\_\_\_

Contributions \_\_\_\_\_

Miscellaneous Deductions \_\_\_\_\_

    Less 2% AGI \_\_\_\_\_

\_\_\_\_\_

TOTAL ITEMIZED DEDUCTIONS \_\_\_\_\_

GREATER OF ITEMIZED OR STANDARD DEDUCTION ( \_\_\_\_\_ )

PERSONAL EXEMPTIONS \_\_\_\_\_ x \_\_\_\_\_ ( \_\_\_\_\_ )

TAXABLE INCOME \_\_\_\_\_