

# Trudy C. Durant and Associates LLC

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## EXTENSION WORKSHEET FOR THE TAX YEAR 2021

First Name and Initial	Taxpayer's Last Name	Social Security #	Occupation	Date of Birth
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First Name and Initial	Spouse's Last Name	Social Security #	Occupation	Date of Birth
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Home Address	City, State and Zip
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Resident State	Home #	Work #	Cell #
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Email Address (Required)	Preferred Contact Tel No.
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### WAGE INFORMATION: TOTAL ALL W-2S AND, IF MARRIED, REPORT TAXPAYER (T) AND SPOUSE (S) SEPARATELY

		T	S
TOTAL FEDERAL WAGES	BOX #1		
TOTAL FEDERAL WITHHOLDING	BOX #2		
RESIDENT STATE WITHHOLDING	BOX #17		
OTHER STATE WITHHOLDING	BOX #17		
TOTAL CITY WITHHOLDING	BOX #19		

INTEREST INCOME (1099-INT)
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DIVIDEND INCOME (1099-DIV)
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STOCK SALE PROCEEDS (1099-B)
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NON EMPLOYEE COMP (1099-MISC)
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ROYALTY INCOME
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COST OF STOCKS SOLD (IF AVAIL)
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SOCIAL SECURITY BENEFITS REC'D
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UNEMPLOYMENT COMPENSATION
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Do You Have A Foreign Bank Acct?	
YES	NO

IRA DISTRIBUTION AMTS? (1099-R)
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PLEASE INDICATE IF ROLLOVER	
YES	NO

Is the Balance Over 10K?	
YES	NO

IRA CONTRIBUTION AMOUNTS
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PLEASE INDICATE ROTH OR TRADITIONAL IRA	
ROTH	TRAD

FEDERAL EST TAX PAYMENTS
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STATE EST TAX PAYMENTS
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PLEASE LIST ALL STATES WORKED IN DURING 2021

COMMENTS OR QUESTIONS: