

Federal Income Tax – Selected Historical Information

| | 2011 | 2012 | 2013 | 2014 | 2015 |
|-----------------------------------|------|------|------|------|------|
| 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 _____