

Supplemental Schedule 3

Information without source documents.

Interest Income

Payer	Amount	Fed WH	State WH

Dividends / Capital Gains

Payer	Ordinary Div	Qualified Div	Capital Gains	Foreign Tax WH	√ if non-taxable	
					Federal	State

Sale of Stocks

Description	T = Taxpayer S = Spouse J = Joint	Date		Selling Price	Cost	Gain (Loss)
		Acquired	Date Sold			

Pension / IRA Distributions

Payer	Gross Distribution	Taxable Amount	Roth Conversion	√ if tax withheld	
				Federal	State

Taxes Paid

Real Estate Tax for personal residence, Land investment, etc. \$ _____
 Other Real Estate Tax (please list detail) _____ \$ _____

Interest Paid

Name of Financial Institution	Primary Home	PMI (insurance)	Second Home, Boat	Home Equity Line of Credit
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____

Please describe what Home Equity Line of Credit proceeds were used for: _____

Closing Points Paid on Purchase or Refinance (attach all paperwork) \$ _____

Interest Paid to Individuals

Name _____ \$ _____

Street Address _____ City _____ State _____ Zip _____ Social Security # _____