CLEAR BENEFITS ADVISORS
TRUSTED INSURANCE RESOURCE

NYS Subsidies are based on your MAGI. Please have your CPA or Financial Advisor to help you fill this worksheet out before our meeting.

Income	Individual 1	Individual 2
Wages		
Social Security		
Unemployment		
Taxable Interest		
Tax Exempt Interest		
Ordinary Dividends		
Capital Gain Distributions (1040A only)		
Capital Gain		
IRA Distributions (taxable amount only)		
Pension & Annuities (taxable amount only)		
Taxable refunds, credits, etc of state & local income taxes		
Alimony Received		
Business Income		
Other Gains		
Rental R-E, royalties, partnerships, S-Corps, trusts		
Farm Income		
Net Operating Loss		
Stock Options		
Cancellation of debt		
Gambling Income		
Other Income		
Capital Loss		
Business Loss		
Other Loss		
Railroad Board Benefits		
Please add extra lines if you have multiple companies paying per line item.		

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