INFORMATION NEEDED FOR 2009 TAX RETURN

- ☐ Originals or copies of social security cards and dates of birth for taxpayer, spouse and dependents (new clients only); info for all new dependents (all clients)
- ☐ Prior year returns if a new client (at least 1 year)
- ☐ W-2 and 1099 forms (Wages, unemployment compensation, interest, dividends, etc.)
- ☐ Pension, Annuity, Social Security & IRA information:
    - ◊ 1099 forms (1099-R for pensions; SSA-1099 for Social Security)
    - ◊ IRA contributions and conversions (traditional and/or Roth)
    - ◊ Keogh, SEP or SIMPLE contributions
- ☐ Capital gain information:
    - ◊ 1099-B forms for sale of securities through a brokerage
    - ◊ Basis and date of purchase for securities on 1099-B forms
    - ◊ Relevant documentation for any other property sold
- ☐ Homeowner information:
    - ◊ Closing statement for home sold during 2009
    - ◊ Closing statement for home purchased during 2009
    - ◊ Refinancing statements, if any
    - ◊ 1098 forms from banks, mortgage companies, etc. (interest paid on mortgage, private mortgage insurance -PMI, mortgage insurance premiums -MIP)
    - ◊ Real Estate taxes
    - ◊ 1099S form (Proceeds from sale of house)
- ☐ Other income information:
    - ◊ Royalty, partnership, trust or S-Corp. income (K-1 forms)
    - ◊ W-2G for gambling winnings; related losses
    - ◊ State & local income tax refunds (1099G forms)
    - ◊ Alimony received along with social security number of payer
    - ◊ Unemployment income forms (1099-G)
- ☐ Business income & expenses:
    - ◊ 1099-MISC Forms
    - ◊ Mileage
    - ◊ Cell Phone / Telephone / Internet
    - ◊ Liability & professional insurance premiums
    - ◊ Meals & Entertainment
    - ◊ Travel, Tolls, Lodging, Parking
    - ◊ Computers, Fax Machines, Printers, Copiers
    - ◊ Advertising
    - ◊ Office Supplies
    - ◊ Trade Show Costs
    - ◊ Temporary help
- ☐ Rental income & expenses:
    - ◊ Rent collected
    - ◊ Advertising
    - ◊ Travel & mileage to inspect/maintain property
    - ◊ Commissions, management fees
    - ◊ Property taxes, tangible taxes, local licensing fees
    - ◊ Mortgage interest
    - ◊ Insurance
    - ◊ Utilities
    - ◊ Association dues
    - ◊ Pest control, lawn maintenance, pool maintenance
    - ◊ Repairs

- ☐ Dependent information:
  - ◊ Names, tax identification numbers, and addresses of dependent care providers, as well as amounts paid for each dependent
  - ◊ Income of dependents, if substantial
  - ◊ Documentation relevant to custody of children of divorced parents
- ☐ Deduction information:
  - ◊ Major medical expenses, medical and long term care insurance
  - ◊ Alimony paid along with social security number of payee
  - ◊ Moving expenses related to a job relocation
  - ◊ Expenses related to investment income (margin interest, etc.)
  - ◊ Casualty losses, including insurance settlement information
  - ◊ State and local taxes
  - ◊ Real Estate taxes
  - ◊ Sales tax paid on major purchases (home improvement, boat, etc.)
  - ◊ Job expenses not reimbursed by employer
  - ◊ Amount of prior year tax preparation fee
  - ◊ Charitable contributions
  - ◊ Student loan interest paid (Form 1098-E)
  - ◊ Tuition & book expenses for any family member attending college (Form 1098-T)
    - ○ Full Time or Part Time Student?
    - ○ Has any credit been taken before? For how many years?
  - ◊ Purchase Agreement for new vehicle, boat or RV
  - ◊ Purchase receipts related to certain electric pump water heater, electric heat pumps, central air conditioners, exterior windows, exterior doors, insulation materials (eligible for energy – related credits)
  - ◊ In home office deduction
    - ○ Equipment
    - ○ Total sq ft of house, total sq ft of room(s) used for office
    - ○ Utility bills: electricity, telephone, water, gas, cable, trash
    - ○ Internet connection
    - ○ Mortgage interest & property taxes
    - ○ Repairs & maintenance and association dues
    - ○ Purchase price and date of home
    - ○ Rent amount if not owned by the taxpayer
- ☐ Amounts and dates of estimated payments
- ☐ Voided check, if direct deposit of your refund is desired