

2009 INCOME TAX ORGANIZER

Taxpayer's Name			Social Security Number		
Spouse's Name			Social Security Number		
Taxpayer's Occupation		Date of Birth (D.O.B.)		Blind?	
Spouse's Occupation		Date of Birth (D.O.B.)		Blind?	
Address				e-mail address	
City	State	Zip	Home Phone	Work Phone	

DEPENDENT CHILDREN (who lived with you more than 6 months)

1) Name	Social Security No.	D.O.B.	2) Name	Social Security No.	D.O.B.
3) Name	Social Security No.	D.O.B.	4) Name	Social Security No.	D.O.B.

OTHER DEPENDENTS

1) Name	Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others
2) Name	Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others

THINGS TO BRING (if applicable) :



- Last Year's Tax Return (if new client)
- W-2 Forms for Wages
- 1099-R for Retirement
- 1099s for Interest, Dividends, and Other Income
- K-1s from Partnerships, Corporations or Estates
- Social Security Benefits Statement
- Voided Check for Direct Deposit
- Property Tax Statements
- IRA Year-end Statements
- 1098 - Mortgage Interest, Tuition, Contributions
- Closing Papers for Purchases & Sales, including purchase and sale dates & amounts
- All Other Statements Showing Income
- Last Pay Stub of the Year

♦ RENTAL/SELF-EMPLOYMENT/FARMING INCOME & EXPENSE

Total Received: \$ _____

Expenses:

- Taxes
- Utilities
- Interest
- Insurance
- Repairs
- Supplies
- Equipment
- Advertising
- Other

Business Mileage (on back)

Home Office Information (exclusive use):

Office sq. footage _____ House sq. footage _____

- Utilities paid
- Insurance paid
- Repairs
- Improvements

Sale of Stock or Other Property	Cost	Sale \$

Please bring supporting documents. **Dates are important!**

OTHER INCOME

- ★ Wages (Forms W-2)
- ★ Interest (Forms 1099)
- ★ Dividends (Forms 1099)
- Tips
- ♦ Child Care
- ★ Pensions/Annuities/Roth Conversions ...
- Jury Duty
- ★ Gambling Winnings
- ★ Unemployment (1099-G)
- Alimony Received
- ★ Prizes (1099-Misc.)
- ★ Debt Cancellation
- ★ Partnerships & S Corporations
- ★ Estates & Trusts
- ★ Social Security/RR Retirement
- Scholarships & Fellowships
- ★ State Tax Refunds
- ★ Royalties
- Disability
- Veteran's Payments
- ★ Did you receive a \$250 stimulus ck?
- ★ Withdrawals from MSA/HSA

★ Bring statements for marked items.

♦ If you need a more detailed worksheet or assistance in compiling records, please call.

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Deductions and Credit Items

ADJUSTMENTS

Payments to an IRA Regular Roth
 Taxpayer Amount \$ SEP SIMPLE
 Spouse Amount \$

Penalty for Early Withdrawal

Alimony Paid \$: SS#: - -

Self-Employed Health Insurance

Student Loan Interest

Job Related Moving Expenses:

Travel & Lodging—Move
 Costs of Moving Household Items.....
 Reimbursement.....

Pymts to MSA/HSA: Taxpayer _____ Spouse _____

MEDICAL EXPENSES

Insurance & Medicare (not pretax)
 Long Term Care Insurance
 Prescriptions.....
 Eyeglasses, Hearing Aids & Batteries.....
 Doctors.....
 Dentists
 Hospital / Ambulance.....
 Auto Mileage..... miles
 Other Medical Expenses, Travel.....
 Reimbursement.....
 Did you receive reimbursement at work? _____

TAXES

Real Estate Taxes.....
 State taxes paid in '09 for '08 or earlier
 State sales tax paid on new vehicle
 State sales tax paid (from receipts)
2009 State Tax Estimates
 date pd. \$ _____ date pd. \$ _____
 date pd. \$ _____ date pd. \$ _____
2009 Federal Tax Estimates
 date pd. \$ _____ date pd. \$ _____
 date pd. \$ _____ date pd. \$ _____
 Vehicle License Tabs, Pers. Prop. Tax.. _____

INTEREST EXPENSE

Home Mortgage—Paid to Financial Institutions (**Form 1098**)
First Mortgage/Refinance in 2009.....
Loan Origination Fee/Discount Fee.....
Second Mortgage.....
Home Equity.....
 Mortgage Insurance.....
 Second Home Interest Payments
 Home Mortgage—Pd. to Individuals
 (name, address, Social Security number)
 Investment Interest: *Margin Account*
Other Investment Interest

HIGHER EDUCATION EXPENSES

Post Secondary Tuition/Req. Fees Paid
 Date: _____ Year in School.....

ADOPTION EXPENSES

Amount Paid: _____ Date Finalized: _____

CONTRIBUTIONS

Churches (received)
 Other Contributions of Money (received)
 Charitable Auto Mileage.....
 Volunteer Expenses (received).....
 Property Donated (for which you have
 receipts (fair market value)—
 bring documentation if over \$500)
 Auto, Boat Donations (Form 1098C)
 Other.....
 Other.....

CASUALTY & THEFT LOSSES

Cost of Property Lost.....
 Fair Market Value of Property.....
 Insurance Reimbursement Received
 Ponzi-style scheme loss.....

JOB RELATED AUTOMOBILE EXPENSE

Total Miles
 Business Miles
 Commuting Miles
 Personal Miles
 Jan. 1, 2009, Odometer Beginning:
 Dec. 31, 2009, Odometer Ending:
 Gas & Oil.....
 Interest.....
 Tolls & Local Transportation.....
 Lease Payments
 Other.....

JOB / INVESTMENT RELATED DEDUCTIONS

LIMITED: Dues & Subscriptions.....
 Education (incl. miles above) ...
 Safety Equipment/Uniforms
 Job Seeking Expense
 (incl. miles above).....
 Legal/Accounting Fees
 Tools/Equipment/Supplies.....
 Business Entertainment.....
 Investment & Tax Advice
 Safe Deposit Box
 Hobby Losses.....
 Other/IRA Fees.....
 Gambling Losses.....
 Impairment Related Work Expenses.....
 Classroom materials for Educators

CHILD CARE EXPENSES

Names, addresses, and ID#s of provider(s), amount paid.

 Do you have a dependent care benefit plan at work? _____

ENERGY CREDITS

Hybrid Vehicle Purchase – Make, year, purchase date:

 Qualified Energy-saving Home Improvements – Type,
 cost: _____