

2009 TAX QUESTIONS

(Please complete and return this form with your tax information)

Name: _____

Cell # _____

Home# _____

Work# _____

Circle one

- Yes or No Did your address change during the year?
- Yes or No Did your marital status change during the year?
- Yes or No Were any children added to your household this year?
- Yes or No Did any children start college or move out of your household?
- Yes or No Did any parents live with you or did you provide financial support for them during the year?
- Yes or No Is anyone in the family totally disabled? If yes, do they receive disability income?
- Yes or No Did you receive an inheritance, alimony, jury duty, or lottery winnings?
- Yes or No Did you begin or end a business investment in a Partnership, LLC, or S-Corp?
- Yes or No Was a business or farm started during the year?
- Yes or No Were any stocks, bonds, or other investment property sold during the year?
- Yes or No Did you purchase, sell or refinance your principal home or second home, or takeout a home equity loan?
- Yes or No Did you receive a distribution from a 401(K), profit-sharing plan, retirement plan, or individual retirement account (including Traditional, Roth, and Education IRAs)?
- Yes or No Did you convert from or contribute to a Traditional, Roth, Regular or Education IRA?
- Yes or No Was a hybrid or alternative fuel vehicle purchased? Copies of receipts are needed.
- Yes or No Was your home rented out or used for business during the year?
- Yes or No Did you add energy efficient improvements to your home this year? Receipts are needed.
- Yes or No Were any gifts made to an individual or trust that totals more than \$12,000?
- Yes or No Did any children have income more than \$850 **NOT** from a W-2?
- Yes or No Did you pay private mortgage insurance (PMI) with your mortgage payment?
- Yes or No Were you notified or audited by either the Internal Revenue Service or a State taxing agency?

(Please See Other Side)

2009 TAX FORMS AND INFORMATION NEEDED

- ü W-2's from all Employers
- ü 1099-INT, 1099-DIV, 1099-R, 1099-SSA, 1099-S and/or 1099-MISC's
- ü 1099-B and Cost Basis for each stock/bond sale.
- ü 1098-T and/or a list of expenses for books, tuition, and required fees paid to the college.
- ü 1098-E and/or statement of student loan interest paid.
- ü 1098's for mortgage interest and real estate taxes paid or real estate bill for non-escrow accounts .
- ü Escrow statement and/or amount of private mortgage insurance (PMI) paid.
- ü Settlement sheets (HUD-1 Forms) from the purchase, sale, or refinance of any real estate.
- ü List of unreimbursed medical expenses including, doctor, dentist, hospital, nursing homes, prescriptions, hearing aids, eye care, medical supplies, medical miles driven, and health and long term care insurance premiums.
- ü Summary of charitable donations **for which there are receipts**, and charitable miles driven.
- ü *Statement from Child Care Provider including the amount paid, name, address and tax ID# or Social Security Number of the provider.*
- ü Listing of unreimbursed job expenses such as teaching supplies, uniforms, professional dues, small hand tools, union dues, safe deposit box rental, tolls, and telephone.
- ü Miles driven for business (**NOT** including to and from work) vehicle make and model _____
Total Miles for 2009 _____ Business Miles for 2009 _____.

ü Estimated Tax Payments made:

Federal		Due Date	State	
Date _____	\$ _____	4/15/09	Date _____	\$ _____
Date _____	\$ _____	6/15/09	Date _____	\$ _____
Date _____	\$ _____	9/15/09	Date _____	\$ _____
Date _____	\$ _____	1/15/10	Date _____	\$ _____

If you have income from New Jersey, Pennsylvania, New York, or Virginia please provide your local town/municipality and school district information.

Comments/Other Information:

(Please See Other Side)