

2009 INCOME TAX DATA SHEET

Note: Due to the new electronic filing systems, the IRS requests that you use the name that is printed on your Social Security Card. We also need all birthdays and Social Security numbers.

Your Name: _____
Social Security #: _____
Occupation: _____
Date of Birth: _____

Spouse's Name: _____
Social Security #: _____
Occupation: _____
Date of Birth: _____

Address: _____
Email: _____

Home Phone: _____
Work Phone: _____
Cell Phone: _____
Fax: _____

Marital Status: Single Separated Married Head of Household

Children and Related Dependents: The IRS requires Name, Birth Date, and Social Security # for each

1. Name: _____
Social Security #: _____
Date of Birth: _____
Relation: _____

3. Name: _____
Social Security #: _____
Date of Birth: _____
Relation: _____

2. Name: _____
Social Security #: _____
Date of Birth: _____
Relation: _____

4. Name: _____
Social Security #: _____
Date of Birth: _____
Relation: _____

**If you have more than 4 children and/or related dependents, please attach a separate sheet*

INCOME

Please **indicate** which types of income items you have, and include all pertinent records and documents.

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Wage (with W-2s)
of W-2s? _____ | <input type="checkbox"/> Rental In. & Exp. | <input type="checkbox"/> Royalties | <input type="checkbox"/> Director Fee |
| <input type="checkbox"/> Interest (1099) | <input type="checkbox"/> Business | <input type="checkbox"/> Sub S K1 | <input type="checkbox"/> Alimony |
| <input type="checkbox"/> Dividends (1099) | <input type="checkbox"/> Farm | <input type="checkbox"/> Partner K1 | <input type="checkbox"/> Tips |
| | <input type="checkbox"/> Pension | <input type="checkbox"/> K1 Estates | <input type="checkbox"/> Unemployment |
| | <input type="checkbox"/> Annuities | <input type="checkbox"/> State Tax Refund | <input type="checkbox"/> Social Security |

Have you bought or sold securities, or have you sold a personal residence or other assets? Yes No

File my return electronically. *Save a tree!* Send an email copy of my return (*instead of a printed copy*)

Would you like to contribute \$3 to the Presidential Election Fund? Yes No

Would your spouse like to contribute to this Fund? Yes No

(This will not change your tax)

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DEDUCTIONS

MEDICAL:

Insurance Premiums _____
Medicine/Prescriptions _____
Doctor/Dentist _____
Medical Miles _____
Hospital _____
Therapy/Chiropractor _____
Insurance Reimbursement _____
Other _____

INTEREST:

Home Mortgage _____
2nd Mortgage _____
2nd Home _____
Investment Interest _____
Student Loan Interest _____

***If your home mortgage interest includes interest on a loan taken out after 8/16/86, and if loan proceeds were not used to buy your home, please bring loan information, settlement sheet, and itemized list of all improvements made to the house since purchase.**

DID YOU BUY OR REFINANCE A HOUSE ?

Yes No

TAXES:

Real Estate _____
Personal Property (Auto) _____
State Tax Paid for 2008 _____
Sales Tax on a New Car _____
Other _____

CHARITABLE CONTRIBUTIONS:

Cash with Receipts _____
Cash: Other _____
Non-Cash with Receipts _____
Other _____

OTHER DEDUCTIONS:

Moving Expenses _____
Employee Business _____
Casualty Theft/Loss _____
Safe Deposit _____
Tax Preparation _____
Dues/Union _____
Uniform Cleaning _____
Education _____
Investment Expenses _____
Job Search _____
Other _____

ESTIMATED TAX PAYMENTS MADE FOR 08/2009:

Date _____	Federal \$ _____	State \$ _____
Date _____	Federal \$ _____	State \$ _____
Date _____	Federal \$ _____	State \$ _____
Date _____	Federal \$ _____	State \$ _____

If you are self-employed, please bring in all books and records that pertain to the business.

OTHER DEDUCTIONS OR CREDITS

Check applicable items and attach documentation:

- | | |
|---|--|
| <input type="checkbox"/> Disability income exclusion | <input type="checkbox"/> Alimony |
| <input type="checkbox"/> Expenses for work-related child care | Social Security # of person being paid alimony:
_____ |
| <input type="checkbox"/> Foreign tax credit | |

Did you convert an IRA to a Roth IRA ? Yes No

If you plan to contribute to an IRA and you or your spouse are covered at work by a pension plan, please include all statements of your existing IRAs.

If you have rental or investment property please indicate whether you are active or passive in the management.

Please provide us with SS# of your child care provider and their address.

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