

2009 INCOME TAX ORGANIZER

GETTING READY: Gather all copies of your W-2's, 1099, 1098 and other tax documents sent to you by employers, government agencies, financial institutions and child care providers. Please use this organizer as a guide to get your tax paperwork ready. The information is essential to having an accurate return prepared. If I did not prepare your return last year, please include a copy of your 2008 return. In order to take advantage of direct deposit, I will need the name of your bank or credit union, routing number, account number, and whether it is checking or savings. A voided check (no deposit slips please) is usually helpful. **Please do not send any sales receipts with your tax information.** Just provide me with the totals.

Your name _____
DOB _____ SS# _____
Address _____ _____
Home Phone _____ Cell _____
Job Title _____
E-mail _____

If spouse and children are the same as last year, please check here and disregard those boxes below:

Spouse _____
DOB _____ SS# _____
Job _____
Title _____
Cell phone _____

<u>Dependents only:</u>	
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____

<u>Child Care Expenses</u>
Provider _____
Address _____ _____
Tax ID# _____
Amount Paid _____

<u>College Tuition Credit</u> (Qualified expenses for undergrads include tuition, books and computers)	
Student _____	Undergrad? Yes/No Qualified expenses _____
Student _____	Undergrad? Yes/No Qualified expenses _____

<u>Student Loans</u>
Total amount paid in 2009 on qualified student loans _____

OVER>

Reportable Gambling Winnings _____ Losses _____
(Please include Jackpot receipts or casino win/loss statement)

Alimony Paid _____

Recipients SS# _____

Alimony Received _____

Total Medical Expenses (if more than 7.5% of adjusted gross income)

Total Property Taxes Paid in 2009
(include school and county/town)

Main Residence _____

Additional Property _____

Misc. Deductions:

Union/Professional Dues \$ _____

Professional Subscriptions \$ _____

Uniforms/Shoes/Boots \$ _____

Uniform Cleaning \$ _____

Training/Job Education \$ _____

Safe Deposit Box \$ _____

Safety Equipment/Tools \$ _____

Cell Phone (business use) \$ _____

Total Business Miles _____

Other Deductions _____

New Vehicle Sales Tax Paid

Date of Sale _____

Purchase Price _____

Sales Tax Paid _____

New Home in 2009

First time homebuyer (after 04/09/08) OR bought new home after 11/7/09 and owned previous home five of the last eight years:

Date of Closing _____

Purchase Price _____

Property Address _____

Charitable Contributions

Cash _____

Property _____

If value of property exceeds \$500, please supply the following information:

Recipient/Organization: _____

Address: _____

Property type (e.g. clothes) _____

Residential Energy Credit/Property Credits

2009 credit is available for the purchase and installation of certain energy star compliant items, such as furnace, hot water tank, air conditioning, exterior windows and doors, and insulation.

Item _____ Date _____ Cost _____

Item _____ Date _____ Cost _____

Direct Deposit Information (Recommended)

Checking or Savings _____

Bank _____ Routing # _____ Account # _____

Please include all original W-2's, 1099's, 1098's, non-cash contribution receipts and any other official tax information received in January. Please provide totals of expenses. Do not send receipts.