

# What to bring to your Tax Preparer

TAXPAYER'S  
NAME \_\_\_\_\_

TAXPAYER'S SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

CELL PHONE  
NUMBER \_\_\_\_\_

HOME  
PHONE \_\_\_\_\_

OFFICE  
PHONE \_\_\_\_\_

E-MAIL  
ADDRESS \_\_\_\_\_

PREPARER'S  
NAME \_\_\_\_\_

## 2009 TAX DOCUMENT CHECKLIST

- Social Security numbers and birthdates for everyone included on your return (spouse, children, parents, etc.)  
**New clients only.**
- Last year's tax return and amount paid for preparing the tax return. **New clients only.**
- Amount of state and local income tax paid in 2009.
- All forms that say W-2, 1098, 1099 or (Schedule), K-1
- Record of other income (rental, jury duty, gambling, hobby, alimony, etc.) and expenses, if applicable.
- Income and expense records for work you performed (not already shown on a W-2 or 1099).
- Purchase date and your total investment in any stocks or other property you sold.
- Expenses related to your investments.
- Vehicle sales tax receipt
- Records of any contributions you made to IRA's or other retirement plans.
- Records for mortgage interest, real estate and personal property tax.
- Amounts donated to houses of worship, schools and other charitable organizations.
- Records of value of non-cash charitable donations.
- Number of miles driven for charitable or medical purposes.
- Amounts paid for health care insurance and to doctors, dentists, hospitals, etc.
- Records to support childcare and higher education costs.
- Employment related expenses (dues, travel, publications, tools, uniform cost and cleaning, etc.)
- Job search expenses and unemployment income (if applicable).
- Energy credit receipts & manufacturers statement

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**"IF THE IRS TOOK 100 TAXPAYERS AT RANDOM AND SENT EACH AN INCORRECT NOTICE THAT THEY OWED AN EXTRA \$92.35 IN TAXES AND INTEREST, MORE THAN TWO-THIRDS WOULD PROBABLY JUST SEND IN A CHECK WITHOUT INVESTIGATING FURTHER."**

**\*CALL US IF YOU RECEIVE ANY LETTERS FROM THE STATE OR FEDERAL GOVERNMENT.**

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- "I want to find out who this FICA guy is and how come he's taking so much of my money."
- There is nothing more permanent than a temporary tax.
- A political promise today means another tax tomorrow.
- What this country needs most is a SPCTT- The society for the prevention of cruelty to tax payers.
- The income tax forms have been simplified beyond all understanding.
- Americans are now in a daze from intoxication.