

TAX RETURN DROP OFF INFORMATION

TAXPAYER'S
NAME _____

TAXPAYER'S SSN _____ - _____ - _____

CELL PHONE
NUMBER _____

HOME
PHONE _____

OFFICE
PHONE _____

E-MAIL
ADDRESS _____

PREPARER'S
NAME _____

2010 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 2010.
- All forms that say W-2, 1098, 1099 or (Schedule), K-1
- Interest and Dividends
- Rents and Royalties
- Social Security and Railroad Retirement
- 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
- Qualified educational expenses-College Tuition
- Teachers & Aids out-of-pocket expenses
- Expenses related to your investments
- Sales tax receipt for vehicle purchased in 2009 & tax paid in 2010

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"There is nothing as useless as doing
efficiently that which should not be
done at all."

***Experience is a wonderful
thing it enables you to
recognize a mistake when you
make it again.***

A businessman was near death and made arrangements for his remains to be sent to the IRS with the following note: "Now you have it all."

- State & Local Income Tax REFUND Amount
- Student loan interest
- Long Term Care Insurance Premiums
- Refinance Points-provide Settlement statement
- The expenses incurred as a National Guard member or an Armed Forces reservist
- 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 and/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
- Hybrid car credit

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- "You first have to decide whether to use the short or the long form. The short form is what the Internal Revenue Service calls "simplified," which means it is designed for people who need the help of a SEARS tax preparation expert to distinguish between their first and last names... The IRS wants you to use the short form because it gets to keep most of your money.
- "Blessed are the young, for they shall inherit the national debt."
- No mans property is safe while Congress is in session.
- A fool and his money are soon parted. The rest of us wait until income tax time.