2010 Tax Client Information Sheet

Personal Information

Your full name, DOB & social security # ______________________________

Spouse's full name , DOB & social security # ______________________________

Address, City, State & Zip ______________________________

Home Phone ______________ Work Phone ______________ Cell Phone ______________

Email Address ______________________________

Next Tax Season we would like to send you tax information and/or a coupon by email. Please check if interested ☐

County of Residence on 1/1/09 ______________ County of Employment on 1/1/09 ______________

Amt. of Rent Paid ______________ Landlord's Name & Address ______________________________

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FILING STATUS – Please check one, based on your marital status on December 31, 2009

SINGLE	MARRIED FILING JOINT	MARRIED FILING SEPARATELY	HEAD OF HOUSEHOLD	QUALIFYING WIDOW/ER
Unmarried or divorced	Married and filing together	Married, not filing together	Single or married but not living with your spouse for the last 6 months of 2009 with a dependent.	Spouse died in 2006 or 2007, you were not remarried as of 1/1/09, and have at least one depended child.
☐	☐	☐	☐	☐

Other people who may belong on your return

DEPENDENTS (It is very important that this information be accurate to avoid delaying your refund.)

Name	Social Security #	Date of Birth	Relationship to Taxpayer	# of months lived in your home.

☐ Childcare records (including the provider's ID number) if applicable

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☐ AGI of other adults in your home (not spouse, if you're filing jointly)

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☐ Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you

Education Payments

☐ Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid. New: This year you may include the cost of books.

☐ Forms 1098-T and 1098-E, if you received them

☐ Scholarships and fellowships

Employee Information

- Forms W-2

Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

Employee/Business Vehicle Information

- Total miles driven for the year (or beginning/ending odometer readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)
- Did you receive the $250 Economic Recovery Payment? Yes / No

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold

Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Prizes and awards
- Other 1099s

Itemizing Deductions

- Forms 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of new vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Receipts for cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance either billed or payroll deduction (Employer subsidized health insurance is not deductible)
- Amounts paid to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of your 2008 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses

IRA Information

- Amount contributed for 2009 (and 2010, if applicable)

If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Copy of 2007 & 2008 Tax Returns

Did you purchase a home in 2008 or 2009? Yes / No If yes, the following docs are needed:

- Copy of closing documents signed by both parties
- Copy of 2007 & 2008 Tax Returns.
- Copy of Mortgage Credit Certificate from your state or local government (If received)

If purchased after November 6, 2009, the following additional documents are needed:

- Most recent Mortgage statement
- For newly constructed home, include the occupancy permit
- At least two of the following which show name/address: Driver's license, Pay statement, Bank Statement, or Automobile registration.
- Have you sold the home? Yes / No

Did you make energy efficient improvements to your home? Yes / No
(ie: windows, roofing, insulation, furnace, heat pump, water heater, & etc.)

- [ ] Manufacturers Certification Letter/Certificate
- [ ] Receipt for materials and labor

- [ ] **Were you a victim of a Ponzi Scheme?** Yes / No

- [ ] **Following Hurricane Katrina, did you purchase Chinese drywall?** Yes / No
(Smell of rotten eggs, problems with appliances, air conditioning, pipes, electronic equipment, plus headaches, nosebleeds, and respiratory problems)

- [ ] **Did you purchase a Qualifying Plug In Electric Vehicle or Hybrid?** Yes / No

- [ ] **Did you purchase Build America Bonds after 2/17/09?** Yes / No

Taxpayer's Signature ______________________________ **Date** __________________

Spouse's Signature ______________________________ **Date** __________________