

1040 INDIVIDUAL TAX WORKSHEETS

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Questions for the Tax Year 2009

Please check the appropriate box and include all necessary details. We are fishing for write-offs, so be complete!

Personal Information

Yes No

Did your marital status change during the year? If yes, explain: _____

Did your residence change during the year?

Can you be claimed as a dependent by another taxpayer?

Dependent Information

Were there any changes in dependents from the prior year?

If yes, explain: _____

Do you have any children (under age 19 or college students under age 24 with unearned income in excess of \$1800)?

Did you pay any student loan interest this year?

Did you or will you, contribute to a Coverdell Education Savings Account this year?

Did you maintain a home for someone not claimed as a dependent?

Did you pay for child care (babysitting, daycare)?

If yes, please provide provider name address and social security number/EIN and amount paid.

Purchases, Sales and Debt Information

Did you start or dispose of a business during the year?

Did you acquire a new or additional interest in an LLC, partnership or corporation?

Did you sell, exchange, or purchase any real estate during the year? (send closing statement)

Did you dispose of any stock during the year? (send original cost and sale price and dates)

Did you participate in puts, calls or "short the box" stock transactions?

Did you take out a home equity loan or line of credit this year or refinance any property?
(send closing statement)

Did you purchase a hybrid (gas/electric) auto? If yes, list make, model, and year.

Income Information

Did you have any foreign income or pay any foreign taxes?

Did you receive any income from property sold prior to this year?

Did you receive any lump-sum payment from a pension or profit sharing plan?

Did you make any rollovers or withdrawals from any retirement account?

Did you receive any disability or unemployment income?

Did you cash in any U.S. Savings bonds?

Did you receive employer-provided educational assistance?

Did your college student receive educational benefits?

Did you receive a 1099-Q for a distribution from a 529 plan? If yes, attach form.

Did you receive a damage award for personal injury, sickness or discrimination?

Did you receive executor fees or jury duty fees? If yes, amount \$ _____

Did you receive or pay alimony (not child support)? If yes, amount \$ _____

(continue)

Deduction Information

Yes No

Did you incur an unreimbursed casualty or theft loss greater than 10% of your income

Do you qualify for any Social Security benefits such as retirement, death, disability
or Medicare? (send statement)

Do you have a one acknowledgment to substantiate cash or check charitable contributions
of \$250 or more and proof of **all** charitable contributions?

Did you have an unreimbursed employee expenses or an allowance?

Did you use your car on the job, for other than commuting?

Did you work out of town during the year?

Did you have educational expenses for you or your dependent(s)?

Did medical expenses exceed 7.5% of your income?

Did you have any moving or job-seeking expenses?

Are you a teacher or school administrator who provided school supplies in your job?

Do you own or invest in a business that would be considered manufacturing?

Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle, or plane purchased for personal use? If yes, amount \$ _____

Do you have a Health Savings Account (HAS) or a Medical Savings Account (MSA)?

If yes, provide the deductible \$ _____ and if single ____ or married ____ coverage

If you worked for yourself, did you pay health insurance premiums for yourself and your family?

If yes, amount \$ _____

Credit Information

Have you started any adoption process?

Did you start a new pension plan this year?

Did you make energy efficient improvements to your home in 2008?

Miscellaneous Information

Are you in the military?

Did you make 2008 gifts of more than \$12,000 to any individual?

Did you engage in any bartering transactions?

Are you covered by a pension plan?

Did you make any Roth or traditional IRA contribution?

Do you have extra cash to contribute more into retirement?

Do you have stock options?

Did you receive correspondence from federal, state, or local tax authorities?

If yes, explain: _____

Do you want to allocate \$# to the Presidential Election Campaign Fund?

Do you have a household employee?

Would you like to have your refund direct deposited (send voided check for account info)

Do you expect significant changes in income, expenses or dependents for 2009?

If yes, explain: _____

Do you **not** have a current will and power of attorney for health care and financial decisions?

Approximate date: _____

Did you live in the Katrina or Wilma Hurricane disaster area?

Did you receive a rebate check during 2008? If yes, amount \$ _____

State Information

Did you contribute to a 529 Plan? If yes, what state plan? _____;
amount\$ _____