



INDIVIDUAL Tax Worksheet

Name: _____ SS # _____ Tax Year: _____

What to Bring:

- If you are a **NEW CLIENT** to us, please bring a copy of last year's return
- List of each person's name, date of birth and social security number (if NEW BIRTH or NEW CLIENT bring SOCIAL SECURITY CARD)

PROOF OF INCOME EARNED

- **All sources of income:** W2 Forms, 1099 Forms, K-1 Forms, interest/dividends earned statements, alimony or spousal support, awards, bonuses etc.
- Income and/or Interest from Investments
Did you sell any stock, funds, contracts for deed or real estate? Bring ORIGINAL cost & date purchased, date of sale and proceeds. Bring documentation for dividends, interest and stock sales.
- Unemployment received? \$ _____
- Social Security? \$ _____
(bring forms)
- Documentation of all other forms of income (1099-Misc., Foreign Income, etc.)

EXPENSES

- Total Medical Expenses: \$ _____
(Must exceed 7.5% of income to count)
- Mortgage Interest Paid: \$ _____
- Property Taxes Paid: \$ _____
Interest on a Contract for Deed requires you to bring Name, Address and SS# of Contract Holder.
- Closing Papers from all Purchases, Sales, Refinances
NEW: Bring ALL old refinance papers AND AMOUNTS OF REFINANCE used to make home improvements.
- 2008 & 2009 Property Tax Statements and/or 2008 CRP Form

(more)

Use back side to list any additional information - attach all other documentation.

- Contributions: Cash/Check \$ _____
Non-Cash _____
Non-cash charitable contributions must be listed. (eg. 5 Blouses - \$\$\$ value, sofa - \$\$\$ value) use back side or attach listing to this sheet.
- Union Dues \$ _____
- Unreimbursed Job Expenses \$ _____
- Moving Expenses \$ _____
(If you moved 50+ miles because of a new job)
- DayCare/Preschool Expenses
Paid \$ _____
Please bring Name, address AND Social Security Number or Fed ID # for Day Care Provider
- Education Expenses
for K-12 Dependents \$ _____
(who, what, why, amount)
- College/Technical Education Expenses
for Self or Dependent \$ _____
(including tuition and/or books)
- Student Loan Interest Paid _____

OTHER ITEMS TO REMEMBER

- IRA, SEP or KEOGH Contributions \$ _____
Withdrawals \$ _____
Rollovers \$ _____
Please bring documentation of any such transactions.
- If you received funds from any non-taxable Foreign Sources, you must report to avoid a Penalty, but it will remain tax free.
- Children under 18 need to file a return if their income or investment sales and/or transfers exceeded \$1700.00. (We will file your dependent children's tax returns starting as low as \$25.00).

01 Ind 2009

ALL FEES PAYABLE AT TIME OF SERVICE OR PRIOR TO E-FILING • CASH, CHECK, CREDIT CARD

NOTE NEW ADDRESS: