

2008 TAX INFORMATION CHECKLIST

First Name and Initial _____ Last Name _____ SS# _____ Date of Birth _____

Spouse's
First Name and Initial _____ Last Name _____ SS# _____ Date of Birth _____

Address _____ Is this a new
_____ Address? _____

Telephone best number(s) to reach you: _____

<u>Dependent Name(s)</u>	<u>Relationship</u>	<u>SS#</u>	<u>Date of Birth</u>	<u># of Months Lived With You (Up to 12)</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Do you wish to donate to the Presidential Election Campaign Fund? _____

Do you wish to file electronically (NO Extra charge) _____ If yes, please attach a voided check or photo copy of a check.
PLEASE NOTE: In order to file electronically, you will need to give us a PIN number for each taxpayer.

PIN _____ PIN _____

Did you earn income in another state? _____ List state(s) _____ Dates Worked _____

Did you live in another state? _____ List state(s) _____ Lived from _____ to _____

NEW FOR 2008

_____ Recovery rebate credit - you may be eligible if you did not receive the economic stimulus or received a reduced amount. (Does not include reductions to cover tax liabilities)

_____ Standard deductions maybe increased by real estate taxes paid and/or federally declared disaster losses

_____ If you are a first time home owner and purchased your home between April 8, 2008 and July 1, 2009, you may be eligible for a tax credit.

_____ Standard Mileage rate changed during the year. Jan 1 to June 30 was 50 ½ cents and from July 1 to Dec 31 it was 58 ½ cents. If you deduct miles for business or other purposes please indicate which period your miles are from.

ITEMS NEEDED:

_____ W-2 wage statements

_____ Unemployment benefit statements

_____ 1099 interest and dividend income statements and other 1099 income statements

_____ Social Security benefit statements (only if you receive income from social security)

2008 TAX INFORMATION CHECKLIST

- _____ Year end investment statements for sale of investment assets; MUST include date of sale, proceeds, date of original purchase and original cost basis.
- _____ If self-employed, include the following: Name of business; kind of business; taxpayer identification number; summary of cash receipts; expenses paid; and equipment purchased during the year. Be careful not to include any loans made to the business in cash receipts.
- _____ If you use a part of your home exclusively for business, include square feet of office versus square feet of home and expenses of your home office. (Utilities, improvements, rent or mortgage interest and property taxes.)
- _____ Rental properties. Summary of rental income and expenses for the year. Summarize all expenses into two categories; expenses directly related to the rental unit(s) and expenses common to all units
_____ If this is a new Rental Property, provide a copy of the settlement statement and tax assessment.
- _____ K-1's from Partnerships or S-Corporations in which you are an owner.

ITEMIZED AND OTHER DEDUCTIONS:

- _____ If you relocated for employment reasons, include a summary of moving expenses not reimbursed by your employer.
- _____ Did you and/or your spouse make IRA, Keogh, or SEP contributions? Include amounts, for whom and date of contribution.
- _____ Alimony paid: amount _____; name and SS# of recipient _____
- _____ Student loan interest paid.
- _____ Summary of medical expenses. Include amounts of long term care premium payments made and/or any benefits received. Include contributions to or withdrawals from medical or health savings accounts.
- _____ City/town tax paid with car, motorcycle, trailers, sleds, camper registrations.
- _____ Real estate taxes paid on all properties.
- _____ Mortgage interest paid on real estate; first and second residences and rental properties. (Form 1098)
- _____ Charitable contributions (cash and property). **Property donations must include receipt with description, value, original cost, date of donation and recipient name and address.**
- _____ Non-reimbursed employee expenses. Educator expenses.
- _____ Misc. items. Union dues, investment fees, safety deposit fees, periodicals, tax preparation fees, etc.
- _____ Purchases and/or sales of property. Copy of closing statement from original purchase and copy of closing statement from sale. If you refinanced during the year include a copy of the settlement statement.
- _____ Child care expenses. The name of the daycare facility or name of day care provider, address, and **federal identification number** or **social security number**. **Please list expenses by child.**

2008 TAX INFORMATION CHECKLIST

_____ Any qualified education expenses, include student, year in school and total expenses. If you have an education savings account include the contributions made and any withdrawals.

_____ Estimated tax payments, federal and state, please include dates paid and payment amounts.

_____ Residential energy efficient property credit, for items installed in your home that qualify for energy savings. Please provide support for expenses.

_____ **New Clients Only** - please provide a copy of your prior year 2007 federal and state tax returns.