## INFORMATION NEEDED FOR 2009 PERSONAL TAX RETURNS

It would be very helpful if you could have your paperwork organized before bringing it to us for tax preparation. Organizing your substantiating documents will help ensure the most accurate filing of your annual tax return.

The following is a checklist of the most commonly needed documents:

- ❑ W-2 Forms
- ❑ 1099 Forms (1099-DIV, 1099-G, 1099-INT, 1099-MISC, etc.)
- ❑ Schedules K-1 (Partnerships, S-Corporations, Trusts)
- ❑ IRA and Retirement Statements (1099R)
- ❑ Social Security Statements
- ❑ Other Miscellaneous Income Information
- ❑ Health Insurance Premiums Paid
- ❑ Other Medical Expenses (including mileage), if significant
- ❑ Property Tax Statements (both issued in 2009 and/or paid in 2009)
- ❑ Auto/Truck License Fees
- ❑ Mortgage and Other Interest Paid Statements
- ❑ Charitable Contribution Receipts, or Other Evidence of Charitable Gifts
- ❑ Information on Energy Credit-Type Purchases in 2009
- ❑ Schedule or Proof of Estimated Tax Payments (when, how much, and to whom)
- ❑ Notices and Correspondence from the Government

In addition, you should share other information with us that may affect your taxes, such as alimony or child support received and tax credit information such as home heating utilities paid. This list is not intended to be complete, so if you are unsure about a document please share it with us.