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INDIVIDUAL TAX INFORMATION ORGANIZER FOR 2009 RETURN

Personal Information - *If you are a new client, please provide copies of last year's tax return.*

Name of Taxpayer *First M.I. Last*		SS # - -
Occupation	Date of Birth	Email address
Address	City	State / Zip
County	Home phone ( )	Work or cell ( )
Are you: legally blind?	Deaf?	Permanently disabled?
Name of Spouse *First M.I. Last*		SS # - -
Occupation	Date of Birth	Email address
Address	City	State / Zip
County	Home phone ( )	Work or cell ( )
Are you: legally blind?	Deaf?	Permanently disabled?

Filing status: □Single □Married filing jointly □Married filing separately □Widow(er) □Head of household
Were you divorced or separated during the year? □Yes □No Were there any deaths in the family? □Yes □No

Names of dependent children *First and last*	*Social Security #*	*Date of birth*	*Relationship*	*Months lived in home in 2009*	*College Student*
	- -				
	- -				
	- -				
	- -				
	- -				

Note: Social Security Number is mandatory (subject to penalty) for each dependent.

Are any children disabled? □Yes □No Did any children have income above $950 for the year? □Yes □No
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent or the child will claim themselves? □Yes □No

Other dependents or people who lived with you

Name	*Social Security #*	*Date of birth*	*Relationship*	*Income*
	- -			
	- -			
	- -			
	- -			

Tax Season Hours: Monday – Thursday 8:00am – 9:00 pm Friday 8:00am – 5:00pm Saturday 8:30am – 4:00pm

NOTE – PLEASE ROUND NUMBER TO WHOLE NUMBERS

Income Information

Please bring in all support documentation such as W-2's and 1099's from employers, brokerage houses, mutual funds, banks and credit unions, etc. for the following:

- Wages
- Interest income – list items separately that have no Form 1099
- Tax exempt interest income received (attach year-end statement)
- Dividends
- Pensions and IRA's *
- Annuities
- Unemployment compensation (Form 1099-G)
- Social Security (attach Social Security report Form SSA-1099)
- Railroad retirement
- State income tax refund
- Gambling winnings

* *If you have reached the age of 70 ½ during the year, you are required to start withdrawing from retirement plans or you could incur a tax penalty. For 2009, no required minimum distribution (RMD) was required.*

Please provide a total amount for (if applicable):

Child Support	$	Alimony received	$
Public assistance	$	Strike benefits	$
Prizes/award	$	Scholarships	$
Education grants	$	Tips/gratuities not reported on W-2	$
Veterans disability	$	Workers compensation	$
Bartering	$	Other	$

If any of the following apply, please attach detail of receipts and expenditures. Contact us if you need additional help:

- Business (Schedule C)
- Rental (Schedule E)
  Property address:
- Farm (Schedule F)
- Schedule K-1's of partnerships, S Corporations, trusts, etc.
- Installment sale payments received
  Interest $ *Principal $* *Payor* *Social security #*
- Sale or trade of business or investment assets, such as real estate or securities (Form 1099-B must be attached)
  We need exact purchase and sale dates and cost including reinvestments, if applicable, to determine the capital gain rate which applies. Electronic spreadsheets can be imported into our tax package. Your statements from your broker (Form 1099-B) sometimes provide the cost/basis information necessary to compute gain or loss. If the statement does not contain this information, you must provide it.

Sales and Exchange Worksheet

Description	*Purchase date*	*Cost*	*Selling date*	*Sale price*
		$		$
		$		$
		$		$
		$		$

Retirement Plans

Maximum $5,000 for 2009 (additional $1,000 if 50 years or older)

Traditional or Roth IRA (indicate which):	*Date made*	Amount
Taxpayer		$
Spouse		$

If amount listed is not the maximum, do you want to contribute the maximum?		☐Yes ☐No
Did you make a retirement plan rollover to a traditional IRA in 2009? If yes, amount		$
Did you make a traditional IRA rollover to a Roth IRA in 2009? If yes, amount		$
Do you or your spouse actively participate in an employer plan?	Self: ☐Yes ☐No	Spouse: ☐Yes ☐No
Did you make contributions for a self-employed SEP, Simple and/or qualified plan.		$

Some contributions for 2009 can be made in 2010

Higher Education

Coverdell Education Savings Account (ESA) - *maximum $2,000 for 2009*

Contributions made in 2009	$	Distributions received in 2009	$

Child Care Credit	
Child care expenses paid to allow parent to work or go to school (please estimate for each child):	
Child's name	*Amount*
	$
	$
	$
TOTAL – *must agree to total paid to all providers listed below*	$
The following information is needed for each provider in order to claim the credit:	
Provider name	
Address	
Social security or ID number	
TOTAL PAID	$
Provider name	
Address	
Social security or ID number	
TOTAL PAID	$
Amount you elected to defer through your payroll to a cafeteria or flex plan for child care in 2009 – *should agree to W-2 box 10*	$

College Credits and/or Deductions

Qualified tuition and course fees paid for student attending eligible education institutions post high school. Please attach your tuition settlement statements and 1098T's.

□Yes □No	Were any children attending college?	*Year in college*	Paid by You: *Tuition* $	*Student loan interest* $	*Books* $
			Paid by student: *Tuition* $	*Student loan interest* $	*Books* $
	Other expenses:				
□Yes □No	Did you pay any tuition for a private school for a dependent child or take classes yourself?				
	Student				*Amount paid* $
	Name and address of school				

Quarterly Tax Estimates Paid – Federal and State

	Federal		*State*	
	Date paid	*Amount*	*Date paid*	*Amount*
1st quarter 2009				
2nd quarter 2009				
3rd quarter 2009				
4th quarter 2009				
Other:				
TOTAL estimates paid for 2009		$		$

State Information

□ Full-year resident □ Part-year resident □ Non-resident

States of residence during 2009:	Dates:
School District:	Did you own or rent your home? □ Own □ Rent

Are you or your spouse a veteran with a service connected disability?	%	%

Contributions made to:

	Michigan Education Trust	*Michigan Education Savings Plan Section 529*
Payments made in 2009	$	$
Distributions received in 2009	$	$

Did you purchase Energy Star rated improvements – Insulation, furnace, water heater, windows, refrigerator, clothes washer or dishwasher?

What and how much?

Did you purchase tangible personal property items that you did not pay Michigan sales tax on?	□Yes □No
If yes, now much was spent including shipping and handling?	$

If you are due a refund, would you like it directly deposited into your bank account? *Name of bank*		
Checking □ *Savings* □	*Routing transit number*	*Account number*
Ask your tax preparer for information about depositing a refund into an IRA account, or splitting the deposit into more than one account.		

KEEP RECEIPTS SUPPORTING TAX DEDUCTIONS AT LEAST 4 YEARS

Itemized Deductions paid during 2009

Deductions must generally exceed $5,700 for single; $11,400 for MFJ; $8,350 HOH; or $5,700 MFS to be a benefit. However, State and local real estate taxes, new motor vehicle taxes, and certain disaster losses may be deductible even if you do not have other itemized deductions.

Medical – *Must exceed 7.5% of income to be a deduction*

Prescription medicines and drugs	$	Doctor, dentist, etc	$
Medical insurance premiums paid	$	Hospitals	$
Medicare insurance paid (SSA-1099)	$	Lab fees	$
Long-term care insurance premiums	Taxpayer $	Eyeglasses and contacts	$
	Spouse $	Other	$
Long-term care expense/nursing home	$		$
Number of medical miles	*at 24 cents per mile*		
Lodging - *limit of $50 per day per person*	$		
Total insurance and HSA reimbursement if not netted in above figures	$		

Taxes – Do not include taxes paid for full or partial business or rental-use property.

Township/city of residence		
Real estate taxes on personal residence:	*Amount*	*Date paid*
Taxable value of residence	*$*	
2008 Winter	*$*	
2009 Summer	$	
2009 Winter	$	
License fees on vehicles		
Other real estate taxes on land, camp, etc:	$	

□Yes □No Did you keep receipts for sales tax paid during 2009?

□Yes □No Did you purchase a car, plane, boat, motorcycle or home in 2009? What it new or used?

Sales tax paid $	*Purchase paid $*	*Date / /*

Charitable

Cash to church and charities *	$
Noncash contribution - Fair market value of items given	$
If over $500, provide details of contributions. Items must be in good used condition or better	
Out-of-pocket expenses for charities	$
Michigan food banks or homeless shelters **	$
Michigan colleges or universities **	$
Michigan community foundations **	$
Foundation name	
Charitable miles *(14 cents per mile)*	
Did you transfer funds from an IRA directly to a charity	□Yes □No

* *New rules require the taxpayer retain documentation for ALL cash contributions.*

** For Michigan tax credits – *do not include in total above*

Interest Expense

Residential interest

Principal residence and one vacation residence (boat or recreational vehicle with living accommodations)

House mortgage paid to financial institution (attach Form 1098 received from lender)	$
Home equity or home improvement loan	$
Mortgage insurance premiums paid (PMI)	$
House mortgage or contract paid to individual:	$

Name *Social Security #*

Address

New mortgage or refinance? For how many payments? Date / /

Points Paid

To refinance a mortgage or purchase a new residence – please bring in closing papers	$

Investment Interest - *i.e. on debt to carry stocks, bonds or investments:*

List:	$
	$

Student loan interest – deduction paid for taxpayers and dependents by taxpayer

$2,500 maximum per year – Income limits apply	$

Casualty and Theft Loss

If you suffered any sudden, unexpected damage or loss of property or a theft, provide details to your preparer

Miscellaneous Deductions - *Attach detail if applicable*	
Union, business and professional dues including work assessments	$
Professional subscriptions	$
Uniform and protective clothing – *not deductible if adaptable for everyday wear*	$
Work tools – *small tools, repairs, etc*.	$
Teaching expenses - *supplies, books, etc*.	$
Education expenses associated with your job – *books, travel etc.*	$
Travel between jobs or to a temporary job *	# of miles
Other business expenses:	$
Tax preparation fees	$
IRA fees – *paid separately*	$
Safe deposit box rent	$
Gambling losses	$
Deductible only up to the amount of gambling winning reported. A log must be kept to verify losses.	
Other deductions or questions	
* *Auto expenses will not be allowed by IRS without adequate written records or sufficient evidence supporting business use. Daily records provide the best protection in case of an audit. Please provide us with total mileage, commuting mileage and business mileage by vehicle. We do have log books available for your use.*	

Adjustments Worksheet	
Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum $250 each ($500 joint)	$
Are you covered by a Health Savings Account (HSA)? Amount of deductible contributions	$
Self-employed SEP, Simple, and qualified plans. Some contributions for 2009 may be made in 2010.	$
Self-employed health insurance deduction. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	$
Penalty on early withdrawal of savings.	$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2009 may be made in 2010.	$
Moving expenses. Job-related move and at least 50 mile increase in commuting distance.	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer

Questions To Be Discussed During Your Tax Return Interview:

Miscellaneous Questions	
☐Yes ☐No	Have you received a $250 one-time lump sum payment in 2009 from Social Security, railroad retirement or VA?
☐Yes ☐No	Have you received any notice from the IRS or state revenue department within the past year?
☐Yes ☐No	Did you provide housing to a person displaced by the 2008 Midwestern storms, tornadoes, or floods?
☐Yes ☐No	Did you buy or sell a home in 2009? ☐ Bought ☐ Sold: Purchase date / / (Provide closing statement)
☐Yes ☐No	If you purchased a new home, did you own a home during any of the three years prior to purchase of your new home?
☐Yes ☐No	Do you have any children who earned more then $1,900 of investment income?
☐Yes ☐No	Will there be any significant changes in income or deductions next year, such as retirement?
☐Yes ☐No	Did you have any uninsured loss to your property in 2009?
☐Yes ☐No	Did you sell or transfer any stock or sell rental or investment property?
☐Yes ☐No	Did you receive any income from an installment sale?
☐Yes ☐No	Did you own a business or an interest in a partnership, corporation, LLC, or other venture?
☐Yes ☐No	Have you paid alternative minimum tax (AMT) in previous years?
☐Yes ☐No	Were you granted, or did you exercise, any employer stock options during 2009?
☐Yes ☐No	Did you engage in any farming activities?
☐Yes ☐No	Did you pay sales or excise tax on a new vehicle, motorcycle, or motor home after February 17, 2009?
☐Yes ☐No	Did you purchase a new energy-efficient car, truck, or van?
☐Yes ☐No	Did you make any new energy-efficient improvements to your home? If yes, provide details.
☐Yes ☐No	Are you involved in any bankruptcy, foreclosure, or repossession proceedings?
☐Yes ☐No	Were you a citizen of or live in a foreign country, or receive income from a foreign investment or bank account?
☐Yes ☐No	Are you a member of the Military?
☐Yes ☐No	Did you pay or receive any alimony? *Amount paid/received $*
	Name of recipient/payee *Social security #*
☐Yes ☐No	Do you wish to allocate $3 to the Presidential Election Campaign (does not affect refund)?
☐Yes ☐No	Did you make gifts of more than $13,000 to any individual?
☐Yes ☐No	Would you like the IRS and State discuss your tax return with your tax preparer if any questions should arise?
☐Yes ☐No	Do you have any worthless securities or uncollectible bad debts? *If yes, provide details.*
☐Yes ☐No	Did you incur any expenses in 2009 or prior years associated with the adoption of a child?
	If yes: amount $
☐Yes ☐No	Did you receive any tips during the year?
	If yes: were all of your tips reported to your employer?
☐Yes ☐No	Did you pay anyone for domestic services in your home?

Contact Us

There are many events that occur during the year that can affect your tax situation. Preparation of your tax return involves summarizing transactions and events that occurred during the prior year. In most situations, treatment is firmly established at the time the transactions occur. However, negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects of a transaction or event, including the following:

• Pension or IRA distributions	• Sale or purchase of a residence or other real estate
• Significant change in income or deductions	• Retirement
• Job change	• Notice from IRS or other revenue department
• Marriage	• Divorce or separation
• Attainment of age 59 ½ or 70 ½	• Self-employment
• Sale or purchase of a business	• Charitable contributions of property in excess of $5,000

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other Information for the preparation of this year’s income tax returns for which I have adequate records.

Signature	Date
Signature	Date