

THINGS TO BRING LIST

1. All copies of W-2, 1099 and K-1 forms
2. Year-end lender loan statement form 1098, settlement sheets regarding refinanced or property purchased or property sold during the year.
3. Form 1099 reporting all mutual fund and stock sales for 2009 as well as purchase data and cost information.
4. Form 1099 reporting unemployment, state tax refunds, social security, gambling, retirement distribution and rollovers.
5. Name, address and **identification numbers** of all childcare providers.
6. All correspondence from IRS and State tax authorities.
7. Anything else you consider maybe helpful.

WHAT HAS CHANGED?

	Yes	No
1. Has your address changed?	___	___
2. Do you want \$3.00 to go to the Presidential Election Fund?	___	___
3. Has your filing status changed? (single, joint, head of household)	___	___
4. Were you or your spouse age 65 on January 1, 2009 or blind?	___	___
5. Dependents:		
a. Do you have anyone living with you who may now qualify?	___	___
b. Are your children 19 as of Dec. 31, 2009 and not a student?	___	___
c. Do you provide support for anyone else?	___	___
d. If divorced: (1) does the agreement specify you obtain dependents exemption? (2) has your (ex) signed form 8332?	___	___
e. Has your child (under 18) income of \$750 or more?	___	___
f. Is your student child age 24 on Dec. 31, 2009?	___	___
g. Did you adopt a child in 2009?	___	___
6. Do you have a dependent(s) that is in 1 st or 2 nd year of college? If yes? # of dependents _____ Tuition and fees paid in 2009 \$_____	___	___
7. Have you, wife or dependents paid tuition, fees etc Other than shown in (6) above? If yes, amount paid \$_____	___	___
8. Travel expense:		
a. Did you seek new work in your current trade or business?	___	___
b. Do you travel to more than one place of work?	___	___
c. Did you have an auto collision or other casualty in 2009?	___	___
9. Did you contribute to an IRA, Keogh, 401K or Simple for 2009?	___	___
10. Did you retire in 2009?	___	___
11. Did you pay any alimony or separate maintenance?	___	___
12. Did you pay estimated taxes for 2009? (indicate amounts & dates paid by quarter)	___	___
Federal 4/15 _____ 6/15 _____ 9/15 _____ 1/15/10 _____		
Mass 4/15 _____ 6/15 _____ 9/15 _____ 1/15/10 _____		
13. Did you pay any major sales taxes during 2009 (boat/car)?	___	___
14. Please list below as reminders any questions you have.		
15. If you are a new client, please bring in, 2006,2007 and 2008 tax returns.	___	___
16. Have you done any energy saving improvements to your home? Explain	___	___
17. If you rent provide landlord's name, address and amount paid in 2009?	___	___