



Client: _____

INCOME

- W-2 Wage Statements _____
- 1099-INT Interest _____
- 1099-DIV Dividends _____
- 1099-MISC Self-Employment _____
- Income _____
- 1099-R Pension, IRA _____
- W-2G Gambling, Lottery _____
- 1099G Unemployment _____
- 1099G State/City Tax Refund _____
- 1099B Investment Sale* _____
- 1099S Property Sale* _____

- K-1 for _____
- Partnership _____
- Limited Partnership _____
- S-Corporation _____
- Trust _____
- Estate _____

- SSA-1099 Social Security _____
- RRB-1099 Railroad Retirement _____
- Alimony _____
- Tips _____
- Scholarships _____
- Jury Duty _____
- Tax Exempt Interest _____
- Property Tax Rebate Recovery _____
- Foreign Earned Income _____

*For investment and property sales we need purchase date, cost, and closing statements.

OTHER DEDUCTIONS/CREDITS

- 1098 E: Student Loan Interest _____
- 1098 T: College Tuition/Fees/Books _____
- (Midwest Disaster Area?) _____
- Alimony Paid _____
- Moving Expenses _____
- Child Care Expenses _____
- (We need provider's name, address, and tax ID number)
- IRA/SEP/SIMPLE Contributions _____
- Roth IRA Contributions or Conversion _____
- Teacher's Classroom Expenses _____
- Health Savings Account Contributions _____
- Adoption Expenses _____
- Homebuyer Credits _____
- (need copy of settlement statement)
- Retirement Saver's Credit _____
- Residential Energy Improvements _____

SCHEDULE A DEDUCTIONS

Medical, Dental, & Optical

(Total must exceed 7.5% of income to be deductible)

- Prescription Drugs _____
- Health Insurance Premiums (you paid) _____
- Long Term Care Insurance _____
- Number of Medical Miles _____
- Doctor, Dental, Hospital and Lab Fees _____
- Vision, Eyeglasses, and Contacts _____

Taxes

- Sales Tax (cars, boats, RVs) _____
- New Car Purchase (after 2/16/09) _____
- Primary Residence Taxes *Paid** _____
- Other Property Taxes _____
- Auto License Plate Tags** _____

Interest

- Home Mortgage Interest _____
- Home Equity Loans _____
- Investment Loans _____
- Mortgage Insurance Premiums _____
- (For new mortgages in 2007, 2008 or 2009 only)

Contributions

- Cash, Check, and Payroll Deductions _____
- (You must provide written receipts for all)

Goods

(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5000, you need appraisal)

Miscellaneous

(Total must exceed 2% of income to be deductible)

- Job Related Mileage _____
- Job Related Books and Tuition _____
- Job Seeking Expenses _____
- Job Equipment, Uniforms _____
- Investment Expenses _____
- Safe Deposit Box _____
- Union/Professional Dues _____
- Tax Preparation Fees _____
- Theft/Casualty Loss _____
- Gambling Losses _____
- (Cannot exceed winnings)

* Please bring property tax bills you received and those you paid.

**Find amount paid on vehicle registration.

Tax Estimates Paid in 2009

	Federal	Michigan	City	Date Paid
1st Quarter	_____	_____	_____	_/_/____
2nd Quarter	_____	_____	_____	_/_/____
3rd Quarter	_____	_____	_____	_/_/____
4th Quarter	_____	_____	_____	_/_/____
TOTAL	_____	_____	_____	

Michigan Taxes

Non-taxable Income (required for Michigan credits)

Child Support _____
 Veterans Pension _____
 Worker's Compensation _____
 Public Assistance (DHS) _____
 Inheritance _____
 Gifts Received in Excess of \$300 _____
 Gain on Sale of Primary Residence _____

Homestead Property Tax Credit

Property Taxes Billed for 2009 _____
 Taxable Value _____
 Rent Paid Per Month _____
 Landlord's Name and Address _____

Energy Home Improvements (must meet Energy Star requirements)

Insulation _____
 Furnace _____
 Water Heaters _____
 Windows _____
 Refrigerators, Clothes Washers and Dishwashers _____

Contributions to Michigan Education Saving Program (MESP 529 Plan) _____

Public Contributions

Michigan Colleges or Universities _____
 Public Libraries _____
 Public TV/Radio Stations _____
 Michigan Political Party/Candidate _____

Miscellaneous Credits

Homeless Shelter/Food Bank Contributions _____
 Michigan Historic Preservation _____
 Income Tax Paid to Another State _____
 Adoption Expenses _____

Use Tax due on Out of State Purchases _____

Electric Bill Surcharge Credit _____

Additional Questions?
