

2009 Income Tax Checklist

*Please review the checklist carefully and provide all relevant items.
You don't need to return this to us unless you make notes we should be aware of.
Thank you!*

Most Commonly Omitted Items – Please be sure to provide!

- Our Questionnaire completed and signed (we require this to prepare your tax returns)
- Copy of **most recent** property tax bill (we cannot complete your VT return without this if you are a homeowner)
- Actual amounts of college tuition paid in addition to Form 1098-T received from educational institution
- Voided check if you wish direct deposit of refund(s) (if you do not provide this your refund will be mailed to you)
- Copy of prior year tax return **only** if you are a new client

Income

- Wages from all employers (W-2's)
- Interest and dividend income (1099's)
- Business and rental income and categorized expenses (please use worksheet provided)
- Income from sale of property/stock/mutual funds (1099-B's, purchase prices and dates for sales)(electronic format gladly accepted!)
- Taxable pensions, annuities and IRA distributions (1099-R's)
- Partnership, Corporation, Estate or Trust income (K-1's)
- Unemployment compensation/Social Security benefits/taxable state refunds
- Alimony/gambling winnings/jury duty pay

Deductions

- Total amount of property tax payments made during 2009 (please provide copy of latest property tax bill)
- Home mortgage and home equity loan interest (Form 1098 from lender)
- Points paid at purchase or refinancing of home (please provide settlement statement)
- Charitable contributions by cash or check, contributions of property, charitable miles driven
- Contributions to an IRA/SEP/SIMPLE/Keogh account (dates and amounts)
- Prescriptions, medical and dental costs, mileage for medical purposes (total medical must exceed 7.5% of AGI to deduct)
- Health insurance premiums paid / long-term care insurance premiums paid
- Educational loan interest (1098-E)
- Classroom expenses up to \$250 paid out-of-pocket by K-12 teachers (must work at least 900 hours)
- Post-secondary tuition paid for taxpayer, spouse and dependents (up to \$4,000) (1098-T) (actual amounts paid must be provided)
- Casualty and theft losses (**only if more than 10% of income**)
- Unreimbursed employee expenses (out-of-pocket expenses for job)
- Business use of car (mileage not reimbursed by employer or self-employed mileage)
- Miscellaneous deductions; education (if required by job), vocational expenses, safe deposit box, investment expenses, professional publications, tax prep fee, tools, uniforms, union dues

Credits

- Child care for work purposes (**names, addresses, SSN or EIN of providers**) **Expenses must be listed by child**
- Post-secondary education tuition paid for you or your dependent(s) (**must provide actual amounts paid, not just 1098-T!**)
- Receipts for Energy Efficient improvements made to your home in 2009 (**see client update for details**)
- Estimated tax payments made to IRS and Vermont (**exact dates and amounts**)

Vermont Act 68 Information - School Property Tax Credit (if you are a homeowner)

- Copy of **most recent** property tax bill (we cannot complete your VT return without this if you are a homeowner!)
- Amount of child support received or paid (if applicable)
- Total amount of monetary gifts received during 2009
- Names, SSN's and 2009 income for **ALL members** of your household (taxable & nontaxable income)

Missing items may delay your tax returns!