Accounting Solutions, LLC

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2009 Year End Tax Letter

IT'S TIME TO GET ORGANIZED!

Tax time is approaching and the following checklist will help you collect the essential documents needed in order for us to prepare your tax return. When all of the boxes are checked, you're ready for your appointment. Bring the actual forms that are listed below.

- ❑ Your last 3 years' tax returns will be helpful if you are a new client. Maybe we can amend and save you some money.
- ❑ Social security numbers and dates of birth are needed for all taxpayers, spouses and dependents.
- ❑ All W-2 Forms
- ❑ Your year end paycheck stub is full of useful information.
- ❑ Forms 1099 for interest, dividends, retirement, Social Security, debt cancellation, unemployment, gambling winnings, etc.
- ❑ Property tax statements contain important information. They list the tax (deductible) and special assessments (not deductible).
- ❑ Forms 1098 for mortgage interest need to be entered as printed. The IRS will cross check.
- ❑ Year-end statements from investment accounts showing all the transaction details for the year are helpful, especially if a sale occurred.
- ❑ Purchase and sale information, including dates, relating to property sold during 2008 is needed.
- ❑ Child care provider information (name, address, SS#, amount paid) is needed for the child care credit even if you have a day care reimbursement plan at work.
- ❑ Names, addresses, and Social Security numbers from whom you received interest, or to whom you paid interest.
- ❑ Bankruptcy or divorce papers (if applicable).
- ❑ If you paid an individual $600 or more for services rendered in connection with your business or rental property, please provide their name, address, and Social Security number.
- ❑ Records showing income and expense for any small business or rental property you own.
- ❑ If you are claiming auto mileage we need to know: total miles, commuting miles and business miles driven for the year.
- ❑ If you have an investment in a Partnership, S Corporation, Estate, or Trust you will need to bring Forms K-1.
- ❑ Individual Retirement Account year-end statements.

- ❑ All other statements of income, whether you think it is taxable or not.
- ❑ Forms 1098-T and amounts paid for post-secondary tuition.
- ❑ Forms 1098 for student loan information
- ❑ Records of estimated taxes paid and copies of all federal or state correspondence during the year.
- ❑ Adoption costs (if applicable)
- ❑ Form 1098-C for donations of automobiles or boats.
- ❑ Details on all cash & non-cash donations (all receipts need to be retained).
- ❑ Information on energy saving home improvements might get you a tax credit.
- ❑ Direct deposit information for any refunds you expect to receive.
- ❑ Medical expenses and health insurance paid.