

## Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year?	—	—
If yes, explain: _____		
Did your address change from last year?	—	—
Can you be claimed as a dependent by another taxpayer?	—	—
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	—	—
	<b>Yes</b>	<b>No</b>
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year?	—	—
If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1,900?	—	—
Do you have dependents who must file a tax return?	—	—
Did you provide over half the support for any other person(s) during the year?	—	—
Did you pay for child care while you worked or looked for work?	—	—
Did you pay any expenses related to the adoption of a child during the year?	—	—
	<b>Yes</b>	<b>No</b>
<b>Purchases, Sales, and Debt Information</b>		
Did you start a new business or purchase rental property during the year?	—	—
Did you acquire a new or additional interest in a partnership or S corporation?	—	—
Did you sell, exchange, or purchase any real estate during the year?	—	—
Did you purchase or sell a principal residence during the year?	—	—
Did you foreclose or abandon a principal residence or real property during the year?	—	—
Did you acquire or dispose of any stock during the year?	—	—
Did you take out a home equity loan this year?	—	—
Did you refinance a principal residence or second home this year?	—	—
Did you sell an existing business, rental, or other property this year?	—	—
Did you incur any non-business bad debts this year?	—	—
Did you have any debts canceled or forgiven this year?	—	—
Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year?	—	—
Did you pay any student loan interest this year?	—	—
	<b>Yes</b>	<b>No</b>
<b>Income Information</b>		
Did you have any foreign income or pay any foreign taxes during the year?	—	—
Did you receive any income from property sold prior to this year?	—	—
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	—	—
Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, SEP, or other qualified retirement plan?	—	—
Did you make any withdrawals/contributions from/to a retirement plan (including IRA) due to Midwestern Disaster area relief?	—	—
Did you make any withdrawals from an education savings or 529 Plan account?	—	—
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	—	—
Did you receive any disability income during the year?	—	—
Did you receive any Social Security benefits during the year?	—	—
Did you receive any unemployment benefits during the year?	—	—
Did you receive tip income not reported to your employer this year?	—	—
Did any of your life insurance policies mature, or did you surrender any policies?	—	—
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	—	—
	<b>Yes</b>	<b>No</b>
<b>Itemized Deduction Information</b>		
Did you incur a casualty or theft loss during the year?	—	—
Do you have evidence to substantiate charitable contributions?	—	—
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	—	—
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.	—	—
Did you have an expense account or allowance during the year?	—	—
Did you use your car on the job, for other than commuting?	—	—
Did you work out of town for part of the year?	—	—

Please check the appropriate box and include all necessary details and documentation.

Yes No

### Itemized Deduction Information, Continued

Did you have any expenses related to seeking a new job during the year?

— —

Did you make any major purchases during the year (cars, boats, etc.)?

— —

Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

— —

Yes No

### Miscellaneous Information

Did you make gifts of more than \$13,000 to any individual?

— —

Did you have any educational expenses during the year?

— —

Did you make any contributions to an education savings or 529 Plan account?

— —

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

— —

Did you pay long-term health care premiums for yourself or your family?

— —

Did you pay any COBRA health care coverage continuation premiums?

— —

Did you engage in any bartering transactions?

— —

Are you an active participant in a pension or retirement plan?

— —

Did you retire or change jobs this year?

— —

Did you incur moving costs because of a job change?

— —

Did you, your spouse, or your dependents attend a post-secondary school during the year?

— —

Did you pay any individual as a household employee during the year?

— —

Did you make energy efficient improvements to your main home this year?

— —

Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?

— —

Did you receive correspondence from the State or Internal Revenue Service?

— —

If yes, explain: \_\_\_\_\_

Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.

— —

Did you pay state and local real estate property taxes this year? If yes, please attach a supporting statement.

— —

## Client Organizer Topical Index

**This client organizer topical index is designed to help you quickly locate the items listed. To use the index just locate the topic and refer to the page number listed. The page number corresponds to the number printed in the top right corner of your organizer sheets. Please note this organizer is customized specifically for you, and may not contain all of the pages listed here.**

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**Please note the following conventions used throughout your client organizer: T/S/J and T/S headings should be used to indicate if an item belongs to the (T)axpayer, (S)pouse, or (J)oint. Also, if an item did not occur in your resident state, please indicate the state's postal code abbreviation in which the item occurred. Control totals and [ ] numbers are for preparer use only.**

# Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) \_\_\_\_\_[1]  
 Mark if you were married but living apart all year \_\_\_\_\_[2]

	Taxpayer	Spouse
Social security number	_____ [3]	_____ [4]
First name	_____ [5]	_____ [6]
Last name	_____ [7]	_____ [8]
Occupation	_____ [9]	_____ [10]
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	_____ [11]	_____ [13]
Mark if legally blind	_____ [14]	_____ [15]
Mark if dependent of another taxpayer	_____ [16]	_____ [17]
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	_____ [18]	
Date of birth	_____ [21]	_____ [22]
Date of death	_____ [23]	_____ [24]
Work/daytime telephone number/ext number	_____ [25] _____ [26]	_____ [27] _____ [28]
Home/evening telephone number	_____ [29]	_____ [30]
Do you authorize us to discuss your return with the IRS? (Y, N)	_____ [31]	

## Present Mailing Address

Address \_\_\_\_\_ [35]  
 Apartment number \_\_\_\_\_ [36]  
 City, state postal code, zip code \_\_\_\_\_ [37] \_\_\_\_\_ [38] \_\_\_\_\_ [39]  
 In care of addressee \_\_\_\_\_ [40]

## Dependent Information

(\*Please refer to Dependent Codes located at the bottom)

[41] First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months lived in your home	Dep Codes * **	Care expenses paid for dependent
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

Name of child who lived with you but is not your dependent \_\_\_\_\_ [42]  
 Social security number of qualifying person \_\_\_\_\_ [43]

### Dependent Codes

- |   |   |
|---|---|
| <b>*Basic</b><br>1 = Child who lived with you<br>2 = Child who did not live with you<br>3 = Other dependent<br>4 = Claimed under pre-1985 agreement<br>5 = Qualifying child for Earned Income Credit only<br>6 = Children who lived with you, but do not qualify for Earned Income Credit<br>7 = Children who lived with you, but do not qualify for Child Tax Credit<br>8 = Children who lived with you, but do not qualify for Child Tax Credit or Earned Income Credit | <b>**Other</b><br>1 = Student (Age 19 - 23)<br>2 = Disabled dependent<br>3 = Dependent who is both a student and disabled |
|---|---|

If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter the following information:

**Primary account:**

Financial institution routing transit number \_\_\_\_\_ [1]  
 Name of financial institution \_\_\_\_\_ [2]  
 Your account number \_\_\_\_\_ [3]  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*, 4 = US Series I Savings Bonds (\$50 increments up to \$5,000)) \_\_\_\_\_ [4]  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [5]

**Secondary account #1:**

Financial institution routing transit number \_\_\_\_\_ [8]  
 Name of financial institution \_\_\_\_\_ [9]  
 Your account number \_\_\_\_\_ [10]  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*, 4 = US Series I Savings Bonds (\$50 increments up to \$5,000)) \_\_\_\_\_ [11]  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [12]

**Secondary account #2:**

Financial institution routing transit number \_\_\_\_\_ [15]  
 Name of financial institution \_\_\_\_\_ [16]  
 Your account number \_\_\_\_\_ [17]  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*, 4 = US Series I Savings Bonds (\$50 increments up to \$5,000)) \_\_\_\_\_ [18]  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [19]

\*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

**Client Contact Information****Preparer - Enter on Screen Contact**

Taxpayer email address \_\_\_\_\_ [6]  
 Spouse email address \_\_\_\_\_ [7]

	<b>Taxpayer</b>	<b>Spouse</b>
Car telephone number	_____ [8]	_____ [15]
Fax telephone number	_____ [9]	_____ [16]
Mobile telephone number	_____ [10]	_____ [17]
Pager number	_____ [11]	_____ [18]
Other:	_____ [12]	_____ [19]
Telephone number	_____ [13]	_____ [20]
Extension	_____ [14]	_____ [21]

**NOTES/QUESTIONS:**

Individuals may claim an additional exemption deduction of \$500 for providing at least 60 days of temporary rent-free housing in your main home to a person dislocated by the midwestern disasters. Enter only those individuals who meet the 60 consecutive days within the 2009 tax year. The additional exemption is per person and limited to a maximum of \$2,000 (\$1,000 if married filing separately). The additional exemption amount available for 2009 will be reduced by any additional exemptions taken in 2008.

**1st displaced individual information:**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Social security number \_\_\_\_\_ [2]  
 First name/Last name \_\_\_\_\_ [3] \_\_\_\_\_ [4]  
 Former address in disaster area:  
 Street Address/Apartment number \_\_\_\_\_ [5] \_\_\_\_\_ [6]  
 City/State/Zip code \_\_\_\_\_ [7] \_\_\_\_ [8] \_\_\_\_\_ [9]  
 Number of consecutive days housed in taxpayer's main home \_\_\_\_\_ [10]

**2nd displaced individual information:**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [11]  
 Social security number \_\_\_\_\_ [12]  
 First name/Last name \_\_\_\_\_ [13] \_\_\_\_\_ [14]  
 Former address in disaster area:  
 Street Address/Apartment number \_\_\_\_\_ [15] \_\_\_\_\_ [16]  
 City/State/Zip code \_\_\_\_\_ [17] \_\_\_\_ [18] \_\_\_\_\_ [19]  
 Number of consecutive days housed in taxpayer's main home \_\_\_\_\_ [20]

**3rd displaced individual information:**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [21]  
 Social security number \_\_\_\_\_ [22]  
 First name/Last name \_\_\_\_\_ [23] \_\_\_\_\_ [24]  
 Former address in disaster area:  
 Street Address/Apartment number \_\_\_\_\_ [25] \_\_\_\_\_ [26]  
 City/State/Zip code \_\_\_\_\_ [27] \_\_\_\_ [28] \_\_\_\_\_ [29]  
 Number of consecutive days housed in taxpayer's main home \_\_\_\_\_ [30]

**4th displaced individual information:**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [31]  
 Social security number \_\_\_\_\_ [32]  
 First name/Last name \_\_\_\_\_ [33] \_\_\_\_\_ [34]  
 Former address in disaster area:  
 Street Address/Apartment number \_\_\_\_\_ [35] \_\_\_\_\_ [36]  
 City/State/Zip code \_\_\_\_\_ [37] \_\_\_\_ [38] \_\_\_\_\_ [39]  
 Number of consecutive days housed in taxpayer's main home \_\_\_\_\_ [40]

<b>Form 8914 Additional Exemptions Claimed in 2008</b>
--

Taxpayer/Spouse (T, S)	Social security number	First name	Last name
____ [41]	_____ [42]	_____ [43]	_____ [44]
____ [45]	_____ [46]	_____ [47]	_____ [48]
____ [49]	_____ [50]	_____ [51]	_____ [52]
____ [53]	_____ [54]	_____ [55]	_____ [56]

Total additional Midwestern Displaced Individual exemptions claimed in 2008 \_\_\_\_\_ [57]

**NOTES/QUESTIONS:**

**Please note that not all returns qualify for electronic filing under IRS rules**

If you qualify for electronic filing, mark if you would like to file the return electronically with the IRS \_\_\_\_\_[1]

Mark if you would like your return prepared and filed electronically only if you receive a refund \_\_\_\_\_[4]

Mark if you would like your return prepared and filed electronically if your refund is greater than a certain amount \_\_\_\_\_[5]

Enter the minimum refund amount here \_\_\_\_\_[6]

Mark if you are filing a balance due return electronically and you want to pay the amount due by debiting your financial institution account \_\_\_\_\_[7]

The IRS requires a Personal Identification Number (PIN) be used in signing returns that are electronically filed.

Each taxpayer and spouse, if applicable, must provide a 5 digit self-selected PIN of your choice other than all zeroes.

Taxpayer self-selected Personal Identification Number (PIN) \_\_\_\_\_[2]

Spouse self-selected Personal Identification Number (PIN) \_\_\_\_\_[3]

---

**NOTES/QUESTIONS:**

If you have an overpayment of 2009 taxes, do you want the excess:

Refunded \_\_\_\_\_ [43]

Applied to 2010 estimated tax liability \_\_\_\_\_ [44]

Do you expect a considerable change in your 2010 income? (Y, N) \_\_\_\_\_ [45]

If yes, please explain any differences:

\_\_\_\_\_ [46]

\_\_\_\_\_ [47]

\_\_\_\_\_ [48]

\_\_\_\_\_ [49]

Do you expect a considerable change in your deductions for 2010? (Y, N) \_\_\_\_\_ [50]

If yes, please explain any differences:

\_\_\_\_\_ [51]

\_\_\_\_\_ [52]

\_\_\_\_\_ [53]

\_\_\_\_\_ [54]

Do you expect a considerable change in the amount of your 2010 withholding? (Y, N) \_\_\_\_\_ [55]

If yes, please explain any differences:

\_\_\_\_\_ [56]

\_\_\_\_\_ [57]

\_\_\_\_\_ [58]

\_\_\_\_\_ [59]

Do you expect a change in the number of dependents claimed for 2010? (Y, N) \_\_\_\_\_ [60]

If yes, please explain any differences:

\_\_\_\_\_ [61]

\_\_\_\_\_ [62]

\_\_\_\_\_ [63]

\_\_\_\_\_ [64]

**2009 Federal Estimated Tax Payments**

2008 overpayment applied to 2009 estimates + \_\_\_\_\_ [1]

Mark if you paid the calculated amounts on the dates due indicated below. Skip the remaining fields. \_\_\_\_\_ [4]

If your estimated payments were not made on the date due or were for an amount other than the calculated amount below, please enter the actual date and amount paid.

	Date Due	Date Paid if After Date Due	Amount Paid	Calculated Amount
1st quarter payment	4/15/09	_____ [5]	+ _____ [6]	_____
2nd quarter payment	6/15/09	_____ [7]	+ _____ [8]	_____
3rd quarter payment	9/15/09	_____ [9]	+ _____ [10]	_____
4th quarter payment	1/15/10	_____ [11]	+ _____ [12]	_____
Additional payment		_____ [13]	+ _____ [14]	_____

**NOTES/QUESTIONS:**

## 2009 State Estimated Tax Payments

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]

State postal code \_\_\_\_\_ [2]

Amount paid with 2008 return + \_\_\_\_\_ [3]

2008 overpayment applied to '09 estimates + \_\_\_\_\_ [4]

Treat calculated amounts as paid \_\_\_\_\_ [8]

	<b>Date Paid</b>		<b>Amount Paid</b>	<b>Calculated Amount</b>
1st quarter payment	_____ [9]	+	_____ [10]	_____ _____ _____ _____
2nd quarter payment	_____ [11]	+	_____ [12]	
3rd quarter payment	_____ [13]	+	_____ [14]	
4th quarter payment	_____ [15]	+	_____ [16]	
Additional payment	_____ [17]	+	_____ [18]	

## 2009 City Estimated Tax Payments

	<b>City #1</b>			<b>City #2</b>
City name	_____ [28]		City name	_____ [50]
Amount paid with 2008 return	+ _____ [31]		Amount paid with 2008 return	+ _____ [53]
2008 overpayment applied to '09 estimates	+ _____ [32]		2008 overpayment applied to '09 estimates	+ _____ [54]
Treat calculated amounts as paid	_____ [36]		Treat calculated amounts as paid	_____ [58]

	<b>Date Paid</b>		<b>Amount Paid</b>		<b>Date Paid</b>		<b>Amount Paid</b>
1st quarter payment	_____ [37]	+	_____ [38]	1st quarter payment	_____ [59]	+	_____ [60]
2nd quarter payment	_____ [39]	+	_____ [40]	2nd quarter payment	_____ [61]	+	_____ [62]
3rd quarter payment	_____ [41]	+	_____ [42]	3rd quarter payment	_____ [63]	+	_____ [64]
4th quarter payment	_____ [43]	+	_____ [44]	4th quarter payment	_____ [65]	+	_____ [66]

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

	<b>City #3</b>			<b>City #4</b>
City name	_____ [72]		City name	_____ [94]
Amount paid with 2008 return	+ _____ [75]		Amount paid with 2008 return	+ _____ [97]
2008 overpayment applied to '09 estimates	+ _____ [76]		2008 overpayment applied to '09 estimates	+ _____ [98]
Treat calculated amounts as paid	_____ [80]		Treat calculated amounts as paid	_____ [102]

	<b>Date Paid</b>		<b>Amount Paid</b>		<b>Date Paid</b>		<b>Amount Paid</b>
1st quarter payment	_____ [81]	+	_____ [82]	1st quarter payment	_____ [103]	+	_____ [104]
2nd quarter payment	_____ [83]	+	_____ [84]	2nd quarter payment	_____ [105]	+	_____ [106]
3rd quarter payment	_____ [85]	+	_____ [86]	3rd quarter payment	_____ [107]	+	_____ [108]
4th quarter payment	_____ [87]	+	_____ [88]	4th quarter payment	_____ [109]	+	_____ [110]

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____







## Interest Income

Please provide copies of all Form 1099-INT or other statements reporting interest income.  
Enter percentages in the XXX.XX format. For example, enter 100% as 100 or 75% as 75.

T/S/J	Type Code (*See codes below)	Interest [1] Income	Tax Exempt Income	Penalty on Early Withdrawal	U.S. Obligations Percent	Tax Exempt Percent	Foreign Taxes Paid	Prior Year Information
	<b>1</b>	Payer						
		Amounts	+					
	<b>2</b>	Payer						
		Amounts	+					
	<b>3</b>	Payer						
		Amounts	+					
	<b>4</b>	Payer						
		Amounts	+					
	<b>5</b>	Payer						
		Amounts	+					
	<b>6</b>	Payer						
		Amounts	+					
	<b>7</b>	Payer						
		Amounts	+					
	<b>8</b>	Payer						
		Amounts	+					
	<b>9</b>	Payer						
		Amounts	+					
	<b>10</b>	Payer						
		Amounts	+					

*Interest Codes		
Blank = Regular Interest	4 = Accrued Interest	6 = ABP Adjustment
3 = Nominee Distribution	5 = OID Adjustment	7 = Series EE & I Bond

## Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.  
Enter percentages in the XXX.XX format. For example, enter 100% as 100 or 75% as 75.

T S Type J Code	(*See codes below)	Ordinary [1] Dividends	Qualified Dividends	Total Cap Gain Distributions	Section 1250	Sec. 1202	28% Capital Gain	Tax Exempt Dividends	U.S. Obligations Percent	Tax Exempt Percent	Foreign Taxes Paid	Prior Year Information
<b>1</b>	Payer											
	Amounts +											
<b>2</b>	Payer											
	Amounts +											
<b>3</b>	Payer											
	Amounts +											
<b>4</b>	Payer											
	Amounts +											
<b>5</b>	Payer											
	Amounts +											
<b>6</b>	Payer											
	Amounts +											
<b>7</b>	Payer											
	Amounts +											
<b>8</b>	Payer											
	Amounts +											
<b>9</b>	Payer											
	Amounts +											
<b>10</b>	Payer											
	Amounts +											

<b>*Dividend Codes</b>	
Blank = Other	3 = Nominee

# Seller Financed Mortgage Interest Income

Please provide copies of all Form 1099-INT or other statements reporting interest income.

### 2009 Information

### Prior Year Information

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ —  
 Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_  
 Payer's social security number \_\_\_\_\_  
 Interest income amount received in 2009 + \_\_\_\_\_ [1]

# Income from REMICs

Please provide all Schedules Q.

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_[1]  
Name of activity \_\_\_\_\_  
Employer identification number \_\_\_\_\_  
State postal code \_\_\_\_\_

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_[1]  
Name of activity \_\_\_\_\_  
Employer identification number \_\_\_\_\_  
State postal code \_\_\_\_\_

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**NOTES/QUESTIONS:**





## Pension, Annuity, and IRA Distributions #1

Please provide all Forms 1099-R.

**2009 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)		__	[1]
Name of payer	_____		[3]
State postal code	_____		[5]
Gross distributions received ( <b>Box 1</b> )	+	_____	[7]
Taxable amount received ( <b>Box 2a</b> )	+	_____	[9]
Federal withholding ( <b>Box 4</b> )	+	_____	[11]
Distribution code ( <b>Box 7</b> )		_____	[13]
Mark if distribution is from an IRA, SEP, SIMPLE retirement plan		_____	[14]
State withholding ( <b>Box 10</b> )	+	_____	[15]
Local withholding ( <b>Box 13</b> )	+	_____	[17]
Amount of rollover	+	_____	[19]
Mark if distribution was due to a pre-retirement age disability		_____	[21]
Mark if distribution was from an inherited IRA		_____	[22]


	<b>Control Totals +</b>	
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## Pension, Annuity, and IRA Distributions #2

Please provide all Forms 1099-R.

**2009 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)		__	[1]
Name of payer	_____		[3]
State postal code	_____		[5]
Gross distributions received ( <b>Box 1</b> )	+	_____	[7]
Taxable amount received ( <b>Box 2a</b> )	+	_____	[9]
Federal withholding ( <b>Box 4</b> )	+	_____	[11]
Distribution code ( <b>Box 7</b> )		_____	[13]
Mark if distribution is from an IRA, SEP, SIMPLE retirement plan		_____	[14]
State withholding ( <b>Box 10</b> )	+	_____	[15]
Local withholding ( <b>Box 13</b> )	+	_____	[17]
Amount of rollover	+	_____	[19]
Mark if distribution was due to a pre-retirement age disability		_____	[21]
Mark if distribution was from an inherited IRA		_____	[22]


	<b>Control Totals +</b>	
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## Pension, Annuity, and IRA Distributions #3

Please provide all Forms 1099-R.

**2009 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)		__	[1]
Name of payer	_____		[3]
State postal code	_____		[5]
Gross distributions received ( <b>Box 1</b> )	+	_____	[7]
Taxable amount received ( <b>Box 2a</b> )	+	_____	[9]
Federal withholding ( <b>Box 4</b> )	+	_____	[11]
Distribution code ( <b>Box 7</b> )		_____	[13]
Mark if distribution is from an IRA, SEP, SIMPLE retirement plan		_____	[14]
State withholding ( <b>Box 10</b> )	+	_____	[15]
Local withholding ( <b>Box 13</b> )	+	_____	[17]
Amount of rollover	+	_____	[19]
Mark if distribution was due to a pre-retirement age disability		_____	[21]
Mark if distribution was from an inherited IRA		_____	[22]


	<b>Control Totals +</b>	
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## Social Security, Tier 1 Railroad Benefits

Please provide a copy of Form(s) SSA-1099 or RRB-1099

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 State postal code \_\_\_\_\_ [2]

### Social Security Benefits

	2009 Information	Prior Year Information
If you received a Form SSA - 1099, please complete the following information:		
Net Benefits for 2009 (Box 3 minus Box 4) <b>(Box 5)</b>	+ _____ [8]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Voluntary Federal Income Tax Withheld <b>(Box 6)</b>	+ _____ [10]	
From the DESCRIPTION OF AMOUNT IN BOX 3 area of Form SSA-1099:		
Medicare premiums	+ _____ [12]	
Prescription drug (Part D) premiums	+ _____ [14]	

### Tier 1 Railroad Benefits

	2009 Information	Prior Year Information
If you received a Form RRB - 1099, please complete the following information:		
Net Social Security Equivalent Benefit:		<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Portion of Tier 1 Paid in 2009 <b>(Box 5)</b>	+ _____ [22]	
Federal Income Tax Withheld <b>(Box 10)</b>	+ _____ [25]	
Medicare Premium Total <b>(Box 11)</b>	+ _____ [27]	

### Additional Information About Benefits Received

Additional information about the benefits received not reported above. For example did you repay any benefits in 2009 or receive any prior year benefits in 2009. This information will be reported in the SSA-1099 DESCRIPTION OF AMOUNT IN BOX 3 area or in the RRB-1099 Boxes 7 through 9.

	[36]
	[37]
	[38]
	[39]
	[40]

**NOTES/QUESTIONS:**



**Miscellaneous Income #1**

Please provide all Forms 1099-MISC

If the miscellaneous income on Form 1099-MISC is related to a business, rental, farm or farm rental, enter the Form 1099-MISC Activity below

Taxpayer/Spouse/Joint (T, S, J)	_____	[1]
Name of payer	_____	[3]
State postal code	_____	[4]
Form 1099-MISC activity (1040 = Form 1040, C = Schedule C, E = Schedule E page 1, F = Schedule F, 4835 = Form 4835)	_____	[7]
Rents <b>(Box 1)</b>	+ _____	[9]
Royalties <b>(Box 2)</b>	+ _____	[11]
Other income <b>(Box 3)</b>	+ _____	[13]
Federal income tax withheld <b>(Box 4)</b>	+ _____	[15]
Fishing boat proceeds <b>(Box 5)</b>	+ _____	[17]
Medical and health care payments <b>(Box 6)</b>	+ _____	[19]
Nonemployee compensation <b>(Box 7)</b>	+ _____	[21]
Substitute payments in lieu of dividends or interest <b>(Box 8)</b>	+ _____	[23]
Payer made direct sales of \$5,000 or more of consumer products <b>(Box 9)</b>	_____	[25]
Crop Insurance proceeds <b>(Box 10)</b>	+ _____	[27]
Excess golden parachute payments <b>(Box 13)</b>	+ _____	[29]
Gross proceeds paid to an attorney <b>(Box 14)</b>	+ _____	[31]
Section 409A deferrals <b>(Box 15a)</b>	+ _____	[33]
Section 409A income <b>(Box 15b)</b>	+ _____	[35]
State tax withheld <b>(Box 16)</b>	+ _____	[37]
State/Payer's state no. <b>(Box 17)</b>	_____	[39]
State income <b>(Box 18)</b>	+ _____	[40]

Control Totals +

**Miscellaneous Income #2**

Please provide all Forms 1099-MISC

If the miscellaneous income on Form 1099-MISC is related to a business, rental, farm or farm rental, enter the Form 1099-MISC Activity below

Taxpayer/Spouse/Joint (T, S, J)	_____	[1]
Name of payer	_____	[3]
State postal code	_____	[4]
Form 1099-MISC activity (1040 = Form 1040, C = Schedule C, E = Schedule E page 1, F = Schedule F, 4835 = Form 4835)	_____	[7]
Rents <b>(Box 1)</b>	+ _____	[9]
Royalties <b>(Box 2)</b>	+ _____	[11]
Other income <b>(Box 3)</b>	+ _____	[13]
Federal income tax withheld <b>(Box 4)</b>	+ _____	[15]
Fishing boat proceeds <b>(Box 5)</b>	+ _____	[17]
Medical and health care payments <b>(Box 6)</b>	+ _____	[19]
Nonemployee compensation <b>(Box 7)</b>	+ _____	[21]
Substitute payments in lieu of dividends or interest <b>(Box 8)</b>	+ _____	[23]
Payer made direct sales of \$5,000 or more of consumer products <b>(Box 9)</b>	_____	[25]
Crop Insurance proceeds <b>(Box 10)</b>	+ _____	[27]
Excess golden parachute payments <b>(Box 13)</b>	+ _____	[29]
Gross proceeds paid to an attorney <b>(Box 14)</b>	+ _____	[31]
Section 409A deferrals <b>(Box 15a)</b>	+ _____	[33]
Section 409A income <b>(Box 15b)</b>	+ _____	[35]
State tax withheld <b>(Box 16)</b>	+ _____	[37]
State/Payer's state no. <b>(Box 17)</b>	_____	[39]
State income <b>(Box 18)</b>	+ _____	[40]

Control Totals +

**Cancellation of Debt, Abandonment #1**

Please provide all Forms 1099-C and 1099-A

If the debt canceled on Form 1099-C, or the property abandoned on Form 1099-A is related to a business, rental, farm or farm rental, enter the Form 1099-C or 1099-A Activity identification below.

Enter a brief description of the debt (i.e. type of debt) and why it was canceled to assist in determining tax ramifications:

[64]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 State postal code \_\_\_\_\_ [3]  
 Name of creditor/lender \_\_\_\_\_ [4]  
 Activity identification (1040 = Form 1040, C = Schedule C, E = Schedule E page 1, F = Schedule F, 4835 = Form 4835) \_\_\_\_\_ [7]

**Form 1099-C Cancellation of Debt**

Date canceled (Box 1) \_\_\_\_\_ [9]  
 Amount of debt canceled (Box 2) + \_\_\_\_\_ [10]  
 Interest if included in box 2 (Box 3) + \_\_\_\_\_ [11]  
 Personally liable for repayment of the debt? (Box 5) Yes \_\_\_ [12] No \_\_\_ [13]  
 Bankruptcy (if checked) (Box 6) \_\_\_\_\_ [14]  
 Fair market value of property (Box 7) + \_\_\_\_\_ [15]

**Form 1099-A Acquisition or Abandonment of Secured Property**

Date of lender's acquisition or knowledge of abandonment (Box 1) \_\_\_\_\_ [16]  
 Balance of principal outstanding (Box 2) + \_\_\_\_\_ [17]  
 Fair market value of property (Box 4) + \_\_\_\_\_ [18]  
 Personally liable for repayment of the debt? (Box 5) Yes \_\_\_ [19] No \_\_\_ [20]

Control Totals +

**Cancellation of Debt, Abandonment #2**

Please provide all Forms 1099-C and 1099-A

If the debt canceled on Form 1099-C, or the property abandoned on Form 1099-A is related to a business, rental, farm or farm rental, enter the Form 1099-C or 1099-A Activity identification below.

Enter a brief description of the debt (i.e. type of debt) and why it was canceled to assist in determining tax ramifications:

[64]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 State postal code \_\_\_\_\_ [3]  
 Name of creditor \_\_\_\_\_ [4]  
 Activity identification (C = Schedule C, E = Schedule E page 1, F = Schedule F, 4835 = Form 4835) \_\_\_\_\_ [7]

**Form 1099-C Cancellation of Debt**

Date canceled (Box 1) \_\_\_\_\_ [9]  
 Amount of debt canceled (Box 2) + \_\_\_\_\_ [10]  
 Interest if included in box 2 (Box 3) + \_\_\_\_\_ [11]  
 Personally liable for repayment of the debt? (Box 5) Yes \_\_\_ [12] No \_\_\_ [13]  
 Bankruptcy (if checked) (Box 6) \_\_\_\_\_ [14]  
 Fair market value of property (Box 7) + \_\_\_\_\_ [15]

**Form 1099-A Acquisition or Abandonment of Secured Property**

Date of lender's acquisition or knowledge of abandonment (Box 1) \_\_\_\_\_ [16]  
 Balance of principal outstanding (Box 2) + \_\_\_\_\_ [17]  
 Fair market value of property (Box 4) + \_\_\_\_\_ [18]  
 Personally liable for repayment of the debt? (Box 5) Yes \_\_\_ [19] No \_\_\_ [20]

Control Totals +

**NOTES/QUESTIONS:**

## Gambling Winnings #1

Please provide all copies of Form W-2G.

**2009 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)		__	[1]
Payer name	_____		[3]
State postal code		__	[4]
Mark if professional gambler			__ [9]
Gross winnings (Box 1)	+	_____	[11]
Federal withholding (Box 2)	+	_____	[13]
Type of wager (Box 3)		_____	[15]
Date won (Box 4)		_____	[17]
Transaction (Box 5)		_____	[19]
Race (Box 6)		_____	[21]
Identical wager winnings (Box 7)	+	_____	[23]
Cashier (Box 8)		_____	[25]
Taxpayer identification number (Box 9)		_____	[27]
Window (Box 10)		_____	[28]
First ID (Box 11)		_____	[30]
Second ID (Box 12)		_____	[31]
Payer's state ID no. (Box 13)		_____	[32]
State withholding (Box 14)	+	_____	[33]
Name of locality		_____	[36]
Local withholding		_____	[37]

	<b>Control Totals +</b>	
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## Gambling Winnings #2

Please provide all copies of Form W-2G.

**2009 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)		__	[1]
Payer name	_____		[3]
State postal code		__	[4]
Mark if professional gambler			__ [9]
Gross winnings (Box 1)	+	_____	[11]
Federal withholding (Box 2)	+	_____	[13]
Type of wager (Box 3)		_____	[15]
Date won (Box 4)		_____	[17]
Transaction (Box 5)		_____	[19]
Race (Box 6)		_____	[21]
Identical wager winnings (Box 7)	+	_____	[23]
Cashier (Box 8)		_____	[25]
Taxpayer identification number (Box 9)		_____	[27]
Window (Box 10)		_____	[28]
First ID (Box 11)		_____	[30]
Second ID (Box 12)		_____	[31]
Payer's state ID no. (Box 13)		_____	[32]
State withholding (Box 14)	+	_____	[33]
Name of locality		_____	[36]
Local withholding		_____	[37]

	<b>Control Totals +</b>	
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**NOTES/QUESTIONS:**

## Shareholders Undistributed Capital Gain #1

Please provide all copies of Form 2439

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains <b>(Box 1a)</b>	+ _____ [9]	
Unrecaptured section 1250 gain <b>(Box 1b)</b>	+ _____ [11]	
<b>Section 1202 gain (Box 1c)</b>	+ _____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone)		
	_____ [15]	
Collectibles (28%) gain <b>(Box 1d)</b>	+ _____ [17]	
Tax paid by the RIC or REIT on the box 1a gains <b>(Box 2)</b>	+ _____ [19]	
<b>Control Totals +</b>		

## Shareholders Undistributed Capital Gain #2

Please provide all copies of Form 2439

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains <b>(Box 1a)</b>	+ _____ [9]	
Unrecaptured section 1250 gain <b>(Box 1b)</b>	+ _____ [11]	
<b>Section 1202 gain (Box 1c)</b>	+ _____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone)		
	_____ [15]	
Collectibles (28%) gain <b>(Box 1d)</b>	+ _____ [17]	
Tax paid by the RIC or REIT on the box 1a gains <b>(Box 2)</b>	+ _____ [19]	
<b>Control Totals +</b>		

## Shareholders Undistributed Capital Gain #3

Please provide all copies of Form 2439

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains <b>(Box 1a)</b>	+ _____ [9]	
Unrecaptured section 1250 gain <b>(Box 1b)</b>	+ _____ [11]	
<b>Section 1202 gain (Box 1c)</b>	+ _____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone)		
	_____ [15]	
Collectibles (28%) gain <b>(Box 1d)</b>	+ _____ [17]	
Tax paid by the RIC or REIT on the box 1a gains <b>(Box 2)</b>	+ _____ [19]	
<b>Control Totals +</b>		

Subject to self-employment tax code (T = Taxpayer, S = Spouse, J = Joint) \_\_\_\_\_ [1]

Mark to indicate all the elections that apply:

Mixed straddle election \_\_\_\_\_ [2]      Mixed straddle account election \_\_\_\_\_ [3]  
 Straddle-by-straddle identification election \_\_\_\_\_ [4]      Net section 1256 contracts loss election \_\_\_\_\_ [5]

**Section 1256 Contracts Marked to Market**

Identification of Account A \_\_\_\_\_ [6]  
 Identification of Account B \_\_\_\_\_  
 Identification of Account C \_\_\_\_\_

	Account A	Account B	Account C
Taxpayer/Spouse/Joint (T, S, J)	—	—	—
State postal code	_____	_____	_____
-Loss/Gain for entire year (Enter losses as a negative amount)	+ _____	+ _____	+ _____
Total Form 1099-B adjustment	+ _____	+ _____	+ _____
Total net 1256 contract loss carryback	+ _____	+ _____	+ _____

**Gains and Losses From Straddles**

Description of Property A \_\_\_\_\_ [8]  
 Description of Property B \_\_\_\_\_  
 Description of Property C \_\_\_\_\_  
 Description of Property D \_\_\_\_\_

	Property A	Property B	Property C	Property D
Taxpayer/Spouse/Joint (T, S, J)	—	—	—	—
State postal code	_____	_____	_____	_____
Date entered into/acquired	_____	_____	_____	_____
Date closed out/sold	_____	_____	_____	_____
Force period	—	—	—	—
Gross sales price	+ _____	+ _____	+ _____	+ _____
Cost plus expense of sale	+ _____	+ _____	+ _____	+ _____
Unrecognized gain	+ _____	+ _____	+ _____	+ _____

**Unrecognized Gain From Positions Held on Last Business Day**

Description of Property A \_\_\_\_\_ [9]  
 Description of Property B \_\_\_\_\_  
 Description of Property C \_\_\_\_\_

	Property A	Property B	Property C
Date acquired	_____	_____	_____
Fair market value on last business day	+ _____	+ _____	+ _____
Cost or other basis as adjusted	+ _____	+ _____	+ _____

**NOTES/QUESTIONS:**

## Canadian Registered Retirement Plans #1

Please provide all Forms T4RSP, T4RIF, and Canadian plan custodian statements

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	__ [1]	
Name of custodian _____	[2]	
State postal code _____	[3]	
Type of plan (1 = RRSP, Registered Retirement Savings Plan, 2 = RRIF, Registered Retirement Income Fund)	__ [13]	
Status in plan (1 = Beneficiary, 2 = Annuitant)	__ [14]	
Election under Article XVIII(7) of the U.S.-Canada income tax treaty:		
Mark if you previously elected to defer income tax	__ [15]	
Year election was made _____	[16]	
Mark if you are electing for this year and subsequent years	__ [17]	
Distributions received from the plan in 2009	+ _____ [20]	

**Complete this section only if NOT electing to defer U.S. income tax on undistributed earnings**

	2009 Information	Prior Year Information
Undistributed earnings		
Interest income	+ _____ [34]	
Ordinary dividends	+ _____ [35]	
Qualified dividends	+ _____ [36]	
Total capital gains	+ _____ [37]	
Other income		
Description _____	[38]	
Amount	+ _____ [39]	

	<b>Control Totals +</b>	
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## Canadian Registered Retirement Plans #2

Please provide all Forms T4RSP, T4RIF, and Canadian plan custodian statements

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	__ [1]	
Name of custodian _____	[2]	
State postal code _____	[3]	
Type of plan (1 = RRSP, Registered Retirement Savings Plan, 2 = RRIF, Registered Retirement Income Fund)	__ [13]	
Status in plan (1 = Beneficiary, 2 = Annuitant)	__ [14]	
Election under Article XVIII(7) of the U.S.-Canada income tax treaty:		
Mark if you previously elected to defer income tax	__ [15]	
Year election was made _____	[16]	
Mark if you are electing for this year and subsequent years	__ [17]	
Distributions received from the plan in 2009	+ _____ [20]	

**Complete this section only if NOT electing to defer U.S. income tax on undistributed earnings**

	2009 Information	Prior Year Information
Undistributed earnings		
Interest income	+ _____ [34]	
Ordinary dividends	+ _____ [35]	
Qualified dividends	+ _____ [36]	
Total capital gains	+ _____ [37]	
Other income		
Description _____	[38]	
Amount	+ _____ [39]	

	<b>Control Totals +</b>	
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**NOTES/QUESTIONS:**

**Preparer use only**

	2009 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	_____ [2]	
Employer identification number	_____ [3]	
Business name	_____ [5]	
Principal business/profession	_____ [6]	
Business code	_____ [10]	
Business address, if different from home address on Organizer Form ID:1040		
Address	_____ [13]	
City/State/Zip	_____ [14]    _____ [15] _____ [16]	
Accounting method (1 = Cash, 2 = Accrual, 3 = Other)	_____ [17]	_____
If other:	_____ [19]	_____
Inventory method (1 = Cost, 2 = LCM, 3 = Other)	_____ [20]	_____
If other enter explanation:	_____ [22]	
_____		
_____		
Enter an explanation if there was a change in determining your inventory:	_____ [23]	
_____		
_____		
Did you "materially participate" in this business? (Y, N)	_____ [24]	_____
If not, number of hours you did significantly participate	_____ [26]	_____
Mark if you began or acquired this business in 2009	_____ [28]	
Mark if this business is considered related to qualified services as a minister or religious worker	_____ [29]	
Did you receive wages as a statutory employee or as a minister? (1 = Statutory employee, 2 = Minister)	_____ [31]	_____
Medical insurance premiums paid by this activity	+ _____ [33]	_____
Long-term care premiums paid by this activity	+ _____ [35]	_____
Amount of wages received as a statutory employee	+ _____ [38]	_____

**Business Income**

	2009 Information	Prior Year Information
Gross receipts or sales	+ _____ [43]	_____
Returns and allowances	+ _____ [45]	_____
Other income:		
_____	+ _____ [47]	_____
_____	+ _____	_____
_____	+ _____	_____
_____	+ _____	_____
_____	+ _____	_____
_____	+ _____	_____

**Cost of Goods Sold**

	2009 Information	Prior Year Information
Beginning inventory	+ _____ [49]	_____
Purchases	+ _____ [51]	_____
Labor:		
_____	+ _____ [53]	_____
_____	+ _____	_____
Materials	+ _____ [55]	_____
Other costs:		
_____	+ _____ [57]	_____
_____	+ _____	_____
_____	+ _____	_____
_____	+ _____	_____
Ending inventory	+ _____ [59]	_____



# Rent and Royalty Property - General Information

Preparer use only

	2009 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	_____ [2]	
Description:	_____ [3]	
_____	_____ [4]	
_____	_____ [5]	
State postal code	_____ [6]	
Type of activity (1 = Rental real estate, 2 = Substantially nondepreciable property, 3 = Royalty)	_____ [7]	
Percentage of ownership if not 100%	_____ [9]	
Business use percentage, if not 100% (Not vacation home percentage)	_____ [11]	

## Rent and Royalty Income

	2009 Information	Prior Year Information
Gross rents received	+ _____ [18]	
Gross royalties received	+ _____ [20]	

## Rent and Royalty Expenses

	2009 Information	Percent if not 100%	Prior Year Information
Advertising	+ _____ [22]	_____ [23]	
Auto	+ _____ [25]	_____ [26]	
Travel	+ _____ [28]	_____ [29]	
Cleaning and maintenance	+ _____ [31]	_____ [32]	
Commissions:			
_____	+ _____ [34]	_____ [36]	
_____	+ _____	_____	
Insurance:			
_____	+ _____ [37]	_____ [39]	
_____	+ _____	_____	
Legal and professional fees	+ _____ [40]	_____ [41]	
Management fees			
_____	+ _____ [43]	_____ [45]	
_____	+ _____	_____	
Mortgage interest paid to banks, etc (Form 1098)	+ _____ [46]	_____ [47]	
Other mortgage interest	+ _____ [49]	_____ [50]	
Qualified mortgage insurance premiums	+ _____ [52]	_____ [53]	
Other interest:			
_____	+ _____ [55]	_____ [57]	
_____	+ _____	_____	
Repairs	+ _____ [58]	_____ [59]	
Supplies	+ _____ [61]	_____ [62]	
Taxes:			
_____	+ _____ [64]	_____ [66]	
_____	+ _____	_____	
_____	+ _____	_____	
Utilities	+ _____ [67]	_____ [68]	
Depreciation	+ _____ [70]	_____ [71]	
Depletion	+ _____ [73]	_____ [74]	
Other expenses:			
_____	+ _____ [79]	_____	
_____	+ _____	_____	
_____	+ _____	_____	
_____	+ _____	_____	
_____	+ _____	_____	
Refinancing points paid this year:			
Description	_____ [81]		
Total points paid/Current amort ( <b>Prep use only</b> )	_____ + _____		
Date of Refinance	_____	Reported on 1098 in 2009	

**Control Totals +**

**Preparer use only**  
 Description \_\_\_\_\_

**Vacation Home Information**

	<b>2009 Information</b>	<b>Prior Year Information</b>				
Number of days home was used personally	_____ [6]	<table border="1" style="width: 100%; height: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; height: 20px;">_____</td></tr> <tr><td style="width: 50%; height: 20px;">_____</td></tr> <tr><td style="width: 50%; height: 20px;">_____</td></tr> <tr><td style="width: 50%; height: 20px;">_____</td></tr> </table>	_____	_____	_____	_____
_____						
_____						
_____						
_____						
Number of days home was rented	_____ [8]					
Number of day home owned, if not 365	_____ [10]					
Carryover of disallowed operating expenses into 2009	+ _____ [20]					
Carryover of disallowed depreciation expenses into 2009	+ _____ [21]					

**Passive and Other Information**

<b>Preparer use only</b>				
<b>Carryovers</b>		<b>Regular</b>		<b>AMT</b>
Operating	+	[28]	+	[29]
Schedule D - Short-term	+	[30]	+	[31]
Schedule D - Long-term	+	[32]	+	[33]
Schedule D - 28% rate	+	[34]	+	[35]
Form 4797 - Part I	+	[36]	+	[37]
Form 4797 - Part II	+	[38]	+	[39]
Comm revitalization	+	[40]	+	[41]
Section 179	+	[42]		

**NOTES/QUESTIONS:**

**Preparer use only**

	2009 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	_____ [2]	
Employer identification number	_____ [3]	
Description	_____ [4]	
Principal Product	_____ [5]	
State postal code	_____ [6]	
Accounting method (1 = Cash, 2 = Accrual)	_____ [7]	_____
Agricultural activity code	_____ [9]	_____
Did you "materially participate" in this business? (Y, N)	_____ [12]	_____
Mark if Schedule F net income or loss should be excluded from self employment income	_____ [14]	_____
Medical insurance premiums paid by this activity	+ _____ [16]	_____
Long-term care premiums paid by this activity	+ _____ [18]	_____

**Cash or Accrual Income Items**

	2009 Information	Prior Year Information
Sales of livestock and other items you bought for resale:		
_____	+ _____ [26]	
_____	+ _____	
_____	+ _____	
Cost or other basis of livestock and other items you bought for resale	+ _____ [28]	
Sale of livestock, produce, grains, other products you raised:		
_____	+ _____ [30]	
_____	+ _____	
_____	+ _____	
Taxable crop insurance proceeds received in 2009	+ _____ [32]	
Mark if electing to defer crop insurance proceeds to 2010	_____ [34]	_____
Crop insurance proceeds deferred from 2008	+ _____ [36]	
Accrual sales of livestock, produce, grains, and other products:		
_____	+ _____ [38]	
_____	+ _____	
_____	+ _____	
Beginning inventory of livestock and other items	+ _____ [40]	
Accrual cost of livestock, produce, grains, and other products purchased	+ _____ [42]	
Ending Inventory of livestock and other items	+ _____ [44]	

**Cash and Accrual Income Items**

	2009 Information	Prior Year Information
Total cooperative distributions you received	+ _____ [46]	
Taxable cooperative distributions you received	+ _____ [48]	
Total agricultural program payments	+ _____ [50]	
Taxable agricultural program payments	+ _____ [52]	
CRP payments received while enrolled to receive social security or disability benefits	_____ [54]	
Commodity credit loans reported under election:		
_____	+ _____ [56]	
_____	+ _____	
Total commodity credit loans forfeited	+ _____ [58]	
Taxable commodity credit loans forfeited	+ _____ [60]	
Total crop insurance proceeds you received in 2009	+ _____ [62]	
Custom hire (machine work) income	+ _____ [64]	
Other income:		
_____	+ _____ [66]	
_____	+ _____	
_____	+ _____	
_____	+ _____	
	+ _____	

**Control Totals +**







Please provide copies of Schedule K-1s showing income from partnerships and S-corporations.

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of entity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership, 5 = Farm Partnership, 6 = Foreign farm partnership) \_\_\_\_\_ [11]  
 Tax shelter registration number \_\_\_\_\_ [12]

	<b>Preparer use only</b>		
	<b>Carryovers</b>	<b>Regular</b>	<b>AMT</b>
<b>Enter on K1-3</b>	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Other losses - 1040 pg.1	[76]	[77]
	Comm revitalization	[78]	[79]
	Section 179	[62]	

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of entity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership, 5 = Farm Partnership, 6 = Foreign farm partnership) \_\_\_\_\_ [11]  
 Tax shelter registration number \_\_\_\_\_ [12]

	<b>Preparer use only</b>		
	<b>Carryovers</b>	<b>Regular</b>	<b>AMT</b>
<b>Enter on K1-3</b>	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Other losses - 1040 pg.1	[76]	[77]
	Comm revitalization	[78]	[79]
	Section 179	[62]	

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of entity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership, 5 = Farm Partnership, 6 = Foreign farm partnership) \_\_\_\_\_ [11]  
 Tax shelter registration number \_\_\_\_\_ [12]

	<b>Preparer use only</b>		
	<b>Carryovers</b>	<b>Regular</b>	<b>AMT</b>
<b>Enter on K1-3</b>	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Other losses - 1040 pg.1	[76]	[77]
	Comm revitalization	[78]	[79]
	Section 179	[62]	

Please provide all copies of Schedules K-1 showing income from estates and trusts.

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Regular	AMT
Enter on K1T-2	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Comm revitalization	[76]	[77]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Regular	AMT
Enter on K1T-2	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Comm revitalization	[76]	[77]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Regular	AMT
Enter on K1T-2	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Comm revitalization	[76]	[77]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Regular	AMT
Enter on K1T-2	Operating	[64]	[65]
	Schedule D - Short-term	[66]	[67]
	Schedule D - Long-term	[68]	[69]
	Schedule D - 28% rate	[70]	[71]
	Form 4797 - Part I	[72]	[73]
	Form 4797 - Part II	[74]	[75]
	Comm revitalization	[76]	[77]

Description \_\_\_\_\_ [1]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Mark if electing to pay tax on entire gain (No exclusion will be calculated and entire gain will be reported on Schedule D) \_\_\_\_\_ [7]  
 Date former residence was acquired \_\_\_\_\_ [9]  
 Date former residence was sold \_\_\_\_\_ [10]  
 Selling price of former residence + \_\_\_\_\_ [11]  
 Expenses related to the sale of your old home + \_\_\_\_\_ [12]  
 Original cost of home sold including capital improvements + \_\_\_\_\_ [13]

**Exclusion Information**

Mark if meet use and ownership test without exceptions (2 years use within 5-year period preceding sale date) \_\_\_\_\_ [20]

	Taxpayer	Spouse
Reduced exclusion days: (Enter only days within 5-year period ending on sale date)		
Number of days each person used property as main home	_____ [22]	_____ [23]
Number of days each person owned property used as main home	_____ [24]	_____ [25]
Number of days between date of sale of the other home and date of sale of this home	_____ [26]	_____ [27]

**Form 6252 - Current Year Installment Sale**

Mortgage and other debts the buyer assumed + \_\_\_\_\_ [29]  
 Total current year payments received + \_\_\_\_\_ [30]

**Form 6252 - Related Party Installment Sale Information**

Related party name \_\_\_\_\_ [31]  
 Address \_\_\_\_\_ [32]  
 City, State and Zip \_\_\_\_\_ [33] [34] \_\_\_\_\_ [35]  
 Identifying number of related party \_\_\_\_\_ [36]  
 Was the property sold as a marketable security? (Y, N) \_\_\_\_\_ [37]  
 Enter date of second sale if more than 2 years after the first sale \_\_\_\_\_ [38]  
 Indicate special conditions if applicable (1 = Sale/exchange, 2 = Involuntary conv, 3 = Death of seller, 4 = No tax avoidance) \_\_\_\_\_ [39]  
 Selling price of property sold by a related party + \_\_\_\_\_ [41]

**NOTES/QUESTIONS:**

## Prior Year Installment Sale

**Preparer use only**

	2009 Information	Prior Year Information
Description _____	[3]	<div style="border: 1px solid black; height: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[7]	
State postal code _____	[8]	
Date acquired _____	[15]	
Date sold _____	[16]	
Gross sales price of property sold + _____	[17]	
Mortgage and other debts the buyer assumed + _____	[19]	
Cost or other basis + _____	[21]	
Commissions and other expenses of the sale + _____	[23]	
Gross profit percentage _____	[25]	
Total current year principal payments received + _____	[31]	
Prior year principal payments received + _____	[33]	
Total ordinary income to recapture + _____	[35]	
Total ordinary income previously recaptured + _____	[37]	

	<b>Control Totals +</b>		
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## Prior Year Installment Sale

**Preparer use only**

	2009 Information	Prior Year Information
Description _____	[3]	<div style="border: 1px solid black; height: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[7]	
State postal code _____	[8]	
Date acquired _____	[15]	
Date sold _____	[16]	
Gross sales price of property sold + _____	[17]	
Mortgage and other debts the buyer assumed + _____	[19]	
Cost or other basis + _____	[21]	
Commissions and other expenses of the sale + _____	[23]	
Gross profit percentage _____	[25]	
Total current year principal payments received + _____	[31]	
Prior year principal payments received + _____	[33]	
Total ordinary income to recapture + _____	[35]	
Total ordinary income previously recaptured + _____	[37]	

	<b>Control Totals +</b>		
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**NOTES/QUESTIONS:**

## Preparer use only

Description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [8]  
 State postal code \_\_\_\_\_ [9]  
 Mark to include gross proceeds for 1099-S reporting on Form, line 1 \_\_\_\_\_ [13]  
 Mark if disposition is due to casualty or theft \_\_\_\_\_ [17]  
 Mark if disposition was to a related party \_\_\_\_\_ [19]

## Sale Information

Date acquired \_\_\_\_\_ [23]  
 Date sold \_\_\_\_\_ [24]  
 Gross sales price or insurance proceeds received + \_\_\_\_\_ [25]  
 Cost or other basis + \_\_\_\_\_ [26]  
 Commissions and other expenses of sale + \_\_\_\_\_ [27]  
 Depreciation allowed or allowable + \_\_\_\_\_ [28]

## Form 4797, Part III - Recapture

Additional depreciation after 1975 (Section 1250) + \_\_\_\_\_ [30]  
 Applicable percentage (if not 100%) (Section 1250) \_\_\_\_\_ [31]  
 Additional depreciation after 1969 (Section 1250) + \_\_\_\_\_ [32]  
 Soil, water and land clearing expenses (Section 1252) + \_\_\_\_\_ [33]  
 Applicable percentage (if not 100%) (Section 1252) \_\_\_\_\_ [34]  
 Intangible drilling and development costs (Section 1254) + \_\_\_\_\_ [35]  
 Applicable payments excluded from income under sec. 126 (Section 1255) + \_\_\_\_\_ [36]

## Form 6252 - Current Year Installment Sale

Mortgage and other debts the buyer assumed + \_\_\_\_\_ [37]  
 Total current year payments received + \_\_\_\_\_ [38]

## Form 6252 - Related Party Installment Sale Information

Related party name \_\_\_\_\_ [39]  
 Address \_\_\_\_\_ [40]  
 State, City and Zip \_\_\_\_\_ [41] [42] [43]  
 Identifying number of related party \_\_\_\_\_ [44]  
 Was the property sold as a marketable security? (Y, N) \_\_\_\_\_ [45]  
 Enter date of second sale \_\_\_\_\_ [46]  
 Indicate special conditions if applicable (1 = Sale/exchange, 2 = Involuntary conv, 3 = Death of seller, 4 = No tax avoidance) \_\_\_\_\_ [47]  
 Selling price of property sold by a related party + \_\_\_\_\_ [49]

## NOTES/QUESTIONS:

**Preparer use only**

Description of property given up	_____	[4]
	_____	[5]
Taxpayer/Spouse/Joint (T, S, J)	_____	[6]
State postal code	_____	[7]
Description of property received	_____	[9]
	_____	[10]

**Date Information**

Date the like-kind property given up was acquired	_____	[17]
Date you transferred your property to the other party	_____	[18]
Date the like-kind property received was identified	_____	[19]
Date you received the like-kind property from the other party	_____	[20]

**Gain and Basis Information**

Fair market value of other property given up	+ _____	[21]
Adjusted basis of other property given up	+ _____	[22]
Cash received	+ _____	[23]
Fair market value of other (not like-kind) property received	+ _____	[24]
Installment obligation received in like-kind exchange	+ _____	[25]
Fair market value of like-kind property you received	+ _____	[26]
Fair market value of non-section 1245 property you received	+ _____	[27]
Liabilities, including mortgages, assumed by you	+ _____	[28]
Cash paid	+ _____	[29]
Adjusted basis of like-kind property given up	+ _____	[30]
Adjusted basis of like-kind property from pass through entity		
Cost or other basis	+ _____	[31]
Depreciation allowed or allowable excluding Section 179	+ _____	[32]
Section 179 expense deduction passed through	+ _____	[33]
Section 179 carryover	+ _____	[34]
Liabilities, including mortgages, assumed by the other party	+ _____	[35]
Exchange expenses incurred by you	+ _____	[36]

**Related Party Exchange Information**

Name of related party	_____	[39]
Address of related party	_____	[40]
City	_____	[41]
State	_____	[42]
Zip code	_____	[43]
Identifying number of related party	_____	[44]
Relationship to you	_____	[45]
During this tax year, did the related party sell or dispose of the property received? (Y, N)	_____	[46]
During this tax year, did you sell or dispose of the like-kind property you received? (Y, N)	_____	[47]
Indicate any special if conditions apply (1 = Death of either party, 2 = Involuntary conversion, 3 = No tax avoidance)	_____	[48]
Mark if this exchange is a prior year like-kind exchange	_____	[50]

**NOTES/QUESTIONS:**

### Foreign Earned Income Exclusion

Taxpayer/Spouse (T, S)  [1] State postal code  [3]  
Employer's name  [2]  
Foreign street address  [4] City   
State/Province  Country code   
Country  Postal code   
U.S. address  [5] City   
State postal code  Zip code   
Foreign street address  [6] City   
State/Province   
Country  Postal code   
Employer type (A = A foreign entity, B = A U.S. company, C = Self, D = A foreign affiliate of a U.S. company, E = Other)  [7]  
If you marked employer as other, please specify type  [8]  
Country of citizenship  [11]  
If maintained a separate foreign residence for your family due to adverse living conditions, provide city, country, and days:  
City/Country  [12] Days   
City/Country  Days   
List tax home(s) during the tax year and dates established:  
Tax home  [13] Date   
Tax home  Date

### Foreign Earned Income Allocation Information

**\*U.S. Business Days and Travel Type Code: 1=Travel to United States; 2=Travel to restricted country; 3=Travel to foreign country**

U.S. business days and travel information: [16]

Type Code*	Name of Country including United States	Date Arrived	Date Left	No. of U.S. business days
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Foreign days worked before and after foreign assignment  [17] Total days worked before and after foreign assignment  [18]  
Total number of days worked during year (defaults to 240)  [19]

### Bona Fide Residence Test

Date foreign residence began  [21] Date foreign residence ended  [22]  
Kind of foreign living quarters (A = Purchased house, B = Rented house or apartment, C = Rented room, D = Quarters furnished by employer)  [23]  
If any family members lived abroad with you during any part of tax year, list who and for what period:  
Relationship  Period abroad  [24]  
Relationship  Period abroad   
Relationship  Period abroad   
Relationship  Period abroad   
Mark if you submitted a statement to foreign country authorities that you are not a resident of that country  [25]  
Mark if required to pay income tax to that country  [26]  
List any contractual terms or other conditions relating to length of employment abroad  [27]  
Type of visa used to enter foreign country  [28]  
Explanation if visa limited length of stay or employment  [29]  
If maintained a home in U.S., enter address, whether it was rented, names of occupants and their relationship to you:  
Address  [30]  
Rented  Occupant  Relationship   
Address  [30]  
Rented  Occupant  Relationship

### Physical Presence Test

Principal country of employment  [31]

Foreign name \_\_\_\_\_  
 Taxpayer/Spouse (T, S) \_\_\_\_\_  
 State postal code \_\_\_\_\_

**Foreign Earned Income**

**\*Please use the Foreign Earned Income Allocation Codes located below**

	Allocation Code*	Amount
Noncash income:		
Home (lodging) _____	[10] ___[11]	+ _____ [12]
Meals _____	[13] ___[14]	+ _____ [15]
Car _____	[16] ___[17]	+ _____ [18]
Other properties or facilities (Please enter code here and description and amount below): _____	___[19]	+ _____ [20]
_____		+ _____
_____		+ _____
_____		+ _____
_____		+ _____
Allowances, reimbursements or expenses paid on behalf:		
Cost of living and overseas differential _____	___[21]	+ _____ [22]
Family _____	___[23]	+ _____ [24]
Education _____	___[25]	+ _____ [26]
Home leave _____	___[27]	+ _____ [28]
Quarters _____	___[29]	+ _____ [30]
Other purposes (Please enter code here and description and amount below): _____	___[31]	+ _____ [32]
_____		+ _____
_____		+ _____
_____		+ _____
_____		+ _____
Other foreign earned income (Please enter code here and description and amount below): _____	___[33]	+ _____ [34]
_____		+ _____
_____		+ _____
_____		+ _____
_____		+ _____
Excludable meals and lodging under section 119 _____		+ _____ [35]

*Foreign Earned Income Allocation Codes
1 = 100% foreign during assignment
2 = 100% U.S. during assignment
3 = U.S. and foreign days worked during assignment
4 = U.S. and foreign days before/after assignment
5 = Days worked before, during, and after assignment

**Deductions Allocable to Foreign Earned Income**

	Allocation Code*	Amount
Other allocable deductions _____	___[36]	+ _____ [37]

**Housing Exclusion/Deduction**

Qualified housing expense _____	+ _____ [46]
---------------------------------	--------------

**NOTES/QUESTIONS:**

## Traditional IRA

	Taxpayer	Spouse
Are you or your spouse (if MFJ or MFS) covered by an employer's retirement plan? (Y, N)	__ [1]	__ [2]
Do you want to contribute the maximum allowable traditional IRA contribution amount? If yes, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	__ [3]	__ [4]
Enter the total traditional IRA contributions made for use in 2009	+ _____ [5]	+ _____ [6]
	<b>Taxpayer</b>	<b>Spouse</b>
Enter the nondeductible contribution amount made for use in 2009	+ _____ [9]	+ _____ [10]
Enter the nondeductible contribution amount made in 2010 for use in 2009	+ _____ [11]	+ _____ [12]
Traditional IRA basis	+ _____ [13]	+ _____ [14]
Value of all your traditional IRA's on December 31, 2009:	+ _____ [15]	+ _____ [16]
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____

## Roth IRA

**Please provide copies of any 1998 through 2008 Form 8606 not prepared by this office**

	Taxpayer	Spouse
Mark if you want to contribute the maximum Roth IRA contribution	__ [25]	__ [26]
Enter the total Roth IRA contributions made for use in 2009	+ _____ [27]	+ _____ [28]
Enter the total amount of Roth IRA conversion recharacterizations for 2009	+ _____ [33]	+ _____ [34]
Enter the total contribution Roth IRA basis on December 31, 2008	+ _____ [37]	+ _____ [38]
Enter the total Roth IRA contribution recharacterizations for 2009	+ _____ [39]	+ _____ [40]
Enter the Roth conversion IRA basis on December 31, 2008	+ _____ [41]	+ _____ [42]
Value of all your Roth IRA's on December 31, 2009:	+ _____ [43]	+ _____ [44]
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____
_____	+ _____	+ _____

**NOTES/QUESTIONS:**

Please provide all Forms 5498-SA.

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	____ [1]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Name of Trustee _____	____ [4]	
State postal code _____	____ [2]	
Archer MSA contributions made in 2009 and 2010 for 2009 <b>(Box 1)</b>	+ _____ [6]	
Total contributions made in 2009 <b>(Box 2)</b>	+ _____ [7]	
Total HSA or Archer MSA contributions made in 2010 for 2009 <b>(Box 3)</b>	+ _____ [8]	
Rollover contribution <b>(Box 4)</b>	+ _____ [9]	
Fair market value of HSA, Archer MSA, or MA MSA <b>(Box 5)</b>	+ _____ [10]	
<b>Box 6 -</b>		
HSA	____ [11]	
Archer MSA	____ [12]	
MA (Medicare Advantage) MSA	____ [13]	

**Additional Information**

	2009 Information	Prior Year Information
Indicate type of coverage under qualifying high deductible health plan (1 = Self-Only, 2 = Family)	____ [20]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Number of months in qualified high deductible health plan in 2009	____ [21]	
Excess contributions for 2008 taken as constructive contributions for 2009	+ _____ [23]	
<b>Complete this section if your account is an Archer MSA or MA MSA</b>		
Amount of annual deductible	+ _____ [30]	
Enter compensation from employer maintaining high deductible health plan	+ _____ [32]	
If self-employed, enter earned income from business under which plan was established	_____ [35]	
<b>Complete this section if your account is an HSA</b>		
Was the high deductible health plan in effect for December 2009? (Y, N)	____ [39]	
Enter any qualified HSA distribution from health flexible spending arrangement (FSA)	_____ [41]	
Enter any qualified HSA distribution from health reimbursement arrangement (HRA)	+ _____ [42]	

**NOTES/QUESTIONS:**

# Health, Medical Savings Account Distributions

Please provide all Forms 1099-SA.

	2009 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____[1]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Name of Trustee _____	_____[4]	
State postal code _____	_____[2]	
Gross distributions received ( <b>Box 1</b> )	+ _____[7]	
Earnings on excess contributions ( <b>Box 2</b> )	+ _____[8]	
Distribution code ( <b>Box 3</b> )	_____[9]	
Fair Market Value on date of death ( <b>Box 4</b> )	+ _____[10]	
<b>Box 5 -</b>		
HSA	_____[11]	
Archer MSA	_____[12]	
MA MSA	_____[13]	
Amount of distribution rolled over or withdrawal of excess contributions for 2009	+ _____[17]	
Unreimbursed qualified medical expenses for 2009	+ _____[18]	
If the distribution is due to the death of the account holder, enter the qualified decedent medical expenses paid by the taxpayer	+ _____[20]	
If MA (Medicare Advantage) MSA, enter value of account on 12/31/08	+ _____[21]	
For HSA accounts: Was the high deductible health plan coverage started in 2008 and in effect for the month of December 2008? (Y, N)	_____[29]	
Was the high deductible health plan coverage ended before 12/31/09? (Y, N)	_____[30]	

## Long Term Care (LTC) Service and Contracts

Please provide all Forms 1099-LTC.

	2009 Information	Prior Year Information
Name of the insured chronically ill individual _____	_____[39]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
Social security number of insured _____	_____[40]	
Gross long-term care (LTC) benefits paid ( <b>Box 1</b> )	+ _____[42]	
Accelerated death benefits paid ( <b>Box 2</b> )	+ _____[43]	
Check one ( <b>Box 3</b> )		
Per diem	_____[44]	
Reimbursed amount	_____[45]	
Qualified contract ( <b>Box 4</b> )	_____[46]	
Check, if applicable ( <b>Box 5</b> )		
Chronically ill	_____[47]	
Terminally ill	_____[48]	
Are there other individuals who received LTC payments during 2009? (Y, N)	_____[49]	
If the insured is terminally ill, were payments received on account of terminal illness? (Y, N)	_____[50]	
Number of days during the long-term care period _____	_____[51]	
Cost incurred for qualified long-term care services during the long-term care period + _____	_____[52]	

**NOTES/QUESTIONS:**

**Preparer use only**

Description of move	_____	[2]
Taxpayer/Spouse/Joint (T, S, J)	_____	[3]
Mark if the move was due to service in the armed forces	_____	[7]
Number of miles from old home to new workplace	_____	[8]
Number of miles from old home to old workplace	_____	[9]
Mark if move is outside United States or its possessions	_____	[10]
Transportation and storage expenses	+ _____	[11]
Travel and lodging (not including meals)	+ _____	[12]
Total amount reimbursed for moving expenses	+ _____	[13]

**NOTES/QUESTIONS:**

**Preparer use only**

Business activity or profession name \_\_\_\_\_ [3]  
 Taxpayer/Spouse (T, S) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Contribute the maximum allowable contribution amount? (1 = Keogh, 2 = SEP, 3 = SIMPLE 401(k), 4 = Solo 401(k), 5 = SIMPLE IRA, 6 = SARSEP) \_\_\_\_\_ [6]  
 Plan contribution rate. Enter in xx.xx format (Limitation percentage) \_\_\_\_\_ [7]  
 Enter the total amount of contributions made to a Keogh plan in 2009 + \_\_\_\_\_ [8]  
 Enter the total amount of contributions made to a Solo 401(k) plan in 2009 + \_\_\_\_\_ [9]  
 Enter the total amount of contributions made to a SEP plan in 2009 + \_\_\_\_\_ [10]  
 Enter the total amount of contributions made to a SARSEP plan in 2009 + \_\_\_\_\_ [11]  
 Enter the total amount of contributions made to a defined benefit plan in 2009 + \_\_\_\_\_ [12]  
 Enter the total amount of contributions made to a profit-sharing plan in 2009 + \_\_\_\_\_ [13]  
 Enter the total amount of contributions made to a money purchase plan in 2009 + \_\_\_\_\_ [14]  
 Enter the total amount of contributions made to a SIMPLE 401(k) plan in 2009 + \_\_\_\_\_ [15]  
 Enter the total amount of contributions to a SIMPLE IRA plan in 2009 + \_\_\_\_\_ [16]

**Catch-up Contributions**

Enter the amount of catch-up contributions made to a Solo 401(k) or SARSEP in 2009 + \_\_\_\_\_ [17]  
 Enter the amount of catch-up contributions made to a SIMPLE Plan in 2009 + \_\_\_\_\_ [18]

**Elective Deferrals**

Enter the total contributions to a Solo 401(k) or SARSEP made through elective deferrals in 2009 + \_\_\_\_\_ [19]  
 Enter the amount of elective deferrals designated as Roth contributions in 2009 + \_\_\_\_\_ [20]

**NOTES/QUESTIONS:**



**Exclusion of Interest Income from Series EE or I U.S. Savings Bonds**

**Complete if you cashed qualified U.S. savings bonds in 2009 that were issued after 1989, and you paid qualified higher education expenses in 2009 for yourself, your spouse, or your dependents.**

Taxpayer/Spouse/Joint (T, S, J)	_____	—
Name of person who was enrolled at eligible educational institution	_____	
Name of eligible educational institution	_____	
Address of eligible educational institution	_____	
Qualified higher education expenses you paid in 2009 for person listed above	+ _____	[1]
Enter any nontaxable educational benefits received for 2009 for person listed above	+ _____	
Taxpayer/Spouse/Joint (T, S, J)	_____	—
Name of person who was enrolled at eligible educational institution	_____	
Name of eligible educational institution	_____	
Address of eligible educational institution	_____	
Qualified higher education expenses you paid in 2009 for person listed above	+ _____	[1]
Enter any nontaxable educational benefits received for 2009 for person listed above	+ _____	
Taxpayer/Spouse/Joint (T, S, J)	_____	—
Name of person who was enrolled at eligible educational institution	_____	
Name of eligible educational institution	_____	
Address of eligible educational institution	_____	
Qualified higher education expenses you paid in 2009 for person listed above	+ _____	[1]
Enter any nontaxable educational benefits received for 2009 for person listed above	+ _____	
Total proceeds from Series EE or I U.S. Savings bonds issued after 1989 and cashed in 2009	+ _____	[3]

**NOTES/QUESTIONS:**

## Student Loan Interest Paid

Complete this section if you paid interest on a qualified student loan in 2009 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

TS	Qualified loan interest you paid <sup>[1]</sup>		2009 Information	Prior Year Information
—	_____	+	_____	_____ _____ _____ _____
—	_____	+	_____	
—	_____	+	_____	
—	_____	+	_____	

## Education Credits and Tuition and Fees Deduction

Complete this form if you paid qualified education expenses for higher education costs in 2009.

Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution. Please provide all copies of Form 1098-T.

TS	Ed Exp Code*	Student's SSN <sup>[6]</sup>	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
—	—	_____	_____	_____	+	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	

**Important: You cannot claim the following for the same student in the same year:**

- Hope credit and Lifetime learning credit
- Tuition and fees deduction and either the Hope credit or the Lifetime learning credit

To qualify for the Hope credit, the student must:

- be enrolled at least half-time
- be in a program leading to degree, certificate, or recognized credential
- not have completed first 4 years of post-secondary education
- have no drug convictions in 2009

<b>*Education Expense Code</b>
1 = Hope credit
2 = Lifetime learning credit
3 = Tuition and fees deduction

**NOTES/QUESTIONS:**

**Qualified Education Programs**

Please provide all copies of Form 1099Q

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Payer name \_\_\_\_\_ [2]  
 State postal code \_\_\_\_\_ [3]  
 Type of account (1= Private QTP, 2 = State QTP, 3 = ESA) \_\_\_\_\_ [4]  
 Relationship to account (1 = Beneficiary, 2 = Account owner, 3 = Both, 4 = Neither) \_\_\_\_\_ [5]  
 Final distribution \_\_\_\_\_ [8]

**Contributions and Basis**

Beneficiary's Information (if not taxpayer or spouse)

Social security number \_\_\_\_\_ [11]  
 First name \_\_\_\_\_ [12]  
 Last name \_\_\_\_\_ [13]

	2009 Information	Prior Year Information
Amount contributed in current year	+ _____ [14]	<div style="border: 1px solid black; padding: 5px;">           _____            _____            _____         </div>
Basis of this account at 12/31/08	+ _____ [17]	
Value of this account at 12/31/09	+ _____ [19]	
Distribution by beneficiary of previously taxed contributions (if not taxpayer or spouse)	+ _____ [24]	

**Payments from Qualified Education Programs**

	2009 Information	Prior Year Information
Gross distribution ( <b>Box 1</b> )	+ _____ [30]	<div style="border: 1px solid black; padding: 5px;">           _____            _____            _____            _____            _____            _____            _____            _____            _____         </div>
Earnings ( <b>Box 2</b> )	+ _____ [32]	
Basis ( <b>Box 3</b> )	+ _____ [34]	
Trustee-to-trustee rollover ( <b>Box 4</b> )	_____ [36]	
Trustee-to-trustee rollover amount if different than Box 1	+ _____ [37]	
<b>Box 5 -</b>		
Private QTP	_____ [39]	
State QTP	_____ [40]	
Coverdell ESA	_____ [41]	
Check if the recipient is not the designated beneficiary ( <b>Box 6</b> )	_____ [42]	
Qualified education expenses	+ _____ [43]	
Elementary and secondary education expenses	+ _____ [45]	

**NOTES/QUESTIONS:**



# Interest Expenses

T/S/J	2009 Information	Type*	Percentage (XXX.XX)	Mortgage Ins. Premiums Paid	Prior Year Information
Home mortgage interest: From Form 1098					
[1]	+	[2]	+		
	+		+		
	+		+		
	+		+		
	+		+		
	+		+		
	+		+		
	+		+		
	+		+		
	+		+		

**\*Mortgage Types**

Blank = Used to buy, build or improve main/qualified second home  
 1 = Not used to buy, build, improve home or investment  
 2 = Used to pay off previous mortgage  
 3 = Used to pay off previous mortgage, excess proceeds invested  
 4 = Taken out before 7/1/82 and secured by home used by taxpayer

T/S/J	Name	SSN	2009 Information	Prior Year Information
Other, such as: Home mortgage interest paid to individuals				
[4]			+	[5]
	Address		+	
	Address		+	
	Address		+	
	Address		+	

**T/S/J** Name and address of other person who received Form 1098 for jointly liable mortgage interest you paid:

— Payer's/Borrower's name \_\_\_\_\_ [7]  
 — Street Address \_\_\_\_\_  
 — City/State/Zip code \_\_\_\_\_

Refinancing Points paid in 2009:

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [8]  
 Description \_\_\_\_\_  
 Total points paid \_\_\_\_\_  
 Percentage of principal exceeding original mortgage (For AMT adjustment) \_\_\_\_\_  
 Points paid in 2009 (**Preparer use only**) \_\_\_\_\_ [9]  
 Date of refinance \_\_\_\_\_  
 Total number of payments \_\_\_\_\_  
 Reported on Form 1098 in 2009 \_\_\_\_\_  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_  
 Description \_\_\_\_\_  
 Total points paid \_\_\_\_\_  
 Percentage of principal exceeding original mortgage (For AMT adjustment) \_\_\_\_\_  
 Points paid in 2009 (**Preparer use only**) \_\_\_\_\_  
 Date of refinance \_\_\_\_\_  
 Total number of payments \_\_\_\_\_  
 Reported on Form 1098 in 2009 \_\_\_\_\_

T/S/J	2009 Information	Prior Year Information
Investment interest expense, other than on K-1s:		
[11]	+	[12]
	+	
	+	
	+	
	+	
	+	
	+	
	+	
	+	

T/S/J	2009 Information	Prior Year Information	
Contributions made by cash or check			
[1] _____	+ _____ [2]		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
[4] Volunteer miles driven _____	_____ [5]		
Noncash items, such as: Goodwill, Salvation Army			
[8] _____	+ _____ [9]		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		
_____	+ _____		

**Miscellaneous Deductions**

T/S/J	2009 Information	Prior Year Information
Unreimbursed expenses, such as: Uniforms, Professional dues, Business publications, Job seeking expenses, Educational expenses		
[11] _____	+ _____ [12]	
_____	+ _____	
_____	+ _____	
_____	+ _____	
_____	+ _____	
_____	+ _____	
Union dues:		
[14] _____	+ _____ [15]	
_____	+ _____	
[17] Tax preparation fees _____	+ _____ [18]	
Other expenses, subject to 2% AGI limitation, such as: Legal/accounting fees, IRA custodian fees		
[20] _____	+ _____ [21]	
_____	+ _____	
_____	+ _____	
_____	+ _____	
[23] Safe deposit box rental _____	+ _____ [24]	
Investment expenses, other than on K1s:		
[26] _____	+ _____ [27]	
_____	+ _____	
_____	+ _____	
Other expenses, not subject to the 2% AGI limitation:		
[30] _____	+ _____ [31]	
_____	+ _____	
_____	+ _____	
_____	+ _____	
Gambling losses: (Enter only if you have gambling income)		
[33] _____	+ _____ [34]	
_____	+ _____	

## Home Mortgage Interest Subject To Limitations #1

**Complete this section if you have home acquisition/improvement debt over \$1,000,000 or home equity debt over \$100,000.**

**Mortgages taken out before 10/14/87 generally qualify as grandfather debt regardless of how the proceeds are used.**

**Home acquisition debt is a mortgage taken out after 10/13/87, the proceeds of which are used to buy, build or substantially improve your home.**

**Home equity debt is a mortgage taken out after 10/13/87, the proceeds of which are NOT used to buy, build, or substantially improve your home.**

	2009 Information	Prior Year Information
Description of loan/property _____	[2]	<div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[3]	
Loan origination date _____	[4]	
Fair market value of home + _____	[5]	
Number of months loan was outstanding in 2009, if not 12 _____	[7]	
Principal paid in 2009 + _____	[9]	
Interest paid during 2009 + _____	[11]	
Points reported on Form 1098 for 2009 + _____	[13]	
Grandfather debt as of 12/31/08 (or first day mortgage was outstanding) + _____	[15]	
Grandfather debt as of 12/31/09 (or last day mortgage was outstanding) + _____	[17]	
Home acquisition/improvement debt as of 12/31/08 (or first day mortgage was outstanding) _____	[19]	
Home acquisition/improvement debt as of 12/31/09 (or last day mortgage was outstanding) _____	[21]	
Home equity debt as of 12/31/08 (or first day mortgage was outstanding) + _____	[23]	
Home equity debt as of 12/31/09 (or last day mortgage was outstanding) + _____	[25]	
Average balance in 2009 of grandfather debt + _____	[27]	
Average balance in 2009 of home acquisition/improvement debt + _____	[29]	
Average balance for 2009 all types of debt + _____	[31]	

**Control Totals +**

## Home Mortgage Interest Subject To Limitations #2

**Complete this section if you have home acquisition/improvement debt over \$1,000,000 or home equity debt over \$100,000.**

**Mortgages taken out before 10/14/87 generally qualify as grandfather debt regardless of how the proceeds are used.**

**Home acquisition debt is a mortgage taken out after 10/13/87, the proceeds of which are used to buy, build or substantially improve your home.**

**Home equity debt is a mortgage taken out after 10/13/87, the proceeds of which are NOT used to buy, build, or substantially improve your home.**

	2009 Information	Prior Year Information
Description of loan/property _____	[2]	<div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[3]	
Loan origination date _____	[4]	
Fair market value of home + _____	[5]	
Number of months loan was outstanding in 2009, if not 12 _____	[7]	
Principal paid in 2009 + _____	[9]	
Interest paid during 2009 + _____	[11]	
Points reported on Form 1098 for 2009 + _____	[13]	
Grandfather debt as of 12/31/08 (or first day mortgage was outstanding) + _____	[15]	
Grandfather debt as of 12/31/09 (or last day mortgage was outstanding) + _____	[17]	
Home acquisition/improvement debt as of 12/31/08 (or first day mortgage was outstanding) _____	[19]	
Home acquisition/improvement debt as of 12/31/09 (or last day mortgage was outstanding) _____	[21]	
Home equity debt as of 12/31/08 (or first day mortgage was outstanding) + _____	[23]	
Home equity debt as of 12/31/09 (or last day mortgage was outstanding) + _____	[25]	
Average balance in 2009 of grandfather debt + _____	[27]	
Average balance in 2009 of home acquisition/improvement debt + _____	[29]	
Average balance for 2009 all types of debt + _____	[31]	

**Control Totals +**

**NOTES/QUESTIONS:**



**Preparer use only**

Taxpayer/Spouse (T, S) \_\_\_\_\_  
 Occupation in which expenses were incurred \_\_\_\_\_  
 State postal code \_\_\_\_\_

## Vehicle Questions

	2009 Information	Prior Year Information
If you used your automobile for work purposes, please answer the following questions:		
Was the vehicle available for off-duty personal use? (Y, N, Blank = Not applicable)	__ [8]	__
Was another vehicle available for personal use? (Y, N)	__ [10]	__
Do you have evidence to support your deduction? (1 = Yes - written, 2 = Yes - not written, 3 = No)	__ [12]	__

## Vehicles #1 and #2 Actual Expenses

Vehicle 1 description \_\_\_\_\_ [16]  
 Comments \_\_\_\_\_  
 Vehicle 2 description \_\_\_\_\_ [44]  
 Comments \_\_\_\_\_

	Vehicle 1	Prior Year Information	Vehicle 2	Prior Year Information
Date vehicle placed in service	_____ [19]	_____	_____ [47]	_____
Total mileage	_____ [21]	_____	_____ [49]	_____
Business mileage	_____ [23]	_____	_____ [51]	_____
Average daily round trip commuting mileage	_____ [26]	_____	_____ [54]	_____
Total commuting mileage	_____ [28]	_____	_____ [56]	_____
Gasoline, oil, repairs, insurance, etc.	+ _____ [30]	_____	+ _____ [58]	_____
Vehicle rentals	+ _____ [32]	_____	+ _____ [60]	_____
Inclusion amount <b>(Preparer use only)</b>	+ _____ [34]	_____	+ _____ [62]	_____
Value of employer-provided vehicle	+ _____ [40]	_____	+ _____ [68]	_____
Depreciation	+ _____ [42]	_____	+ _____ [70]	_____

## Vehicles #3 and #4 Actual Expenses

Vehicle 3 description \_\_\_\_\_ [74]  
 Comments \_\_\_\_\_  
 Vehicle 4 description \_\_\_\_\_ [102]  
 Comments \_\_\_\_\_

	Vehicle 3	Prior Year Information	Vehicle 4	Prior Year Information
Date vehicle placed in service	_____ [77]	_____	_____ [105]	_____
Total mileage	_____ [79]	_____	_____ [107]	_____
Business mileage	_____ [81]	_____	_____ [109]	_____
Average daily round trip commuting mileage	_____ [84]	_____	_____ [112]	_____
Total commuting mileage	_____ [86]	_____	_____ [114]	_____
Gasoline, oil, repairs, insurance, etc.	+ _____ [88]	_____	+ _____ [116]	_____
Vehicle rentals	+ _____ [90]	_____	+ _____ [118]	_____
Inclusion amount <b>(Preparer use only)</b>	+ _____ [92]	_____	+ _____ [120]	_____
Value of employer-provided vehicle	+ _____ [98]	_____	+ _____ [126]	_____
Depreciation	+ _____ [100]	_____	+ _____ [128]	_____

**NOTES/QUESTIONS:**

## Noncash Contributions Exceeding \$500

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis + \_\_\_\_\_ [13]  
 Fair market value + \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

	<b>Control Totals +</b>	
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## Noncash Contributions Exceeding \$500

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis + \_\_\_\_\_ [13]  
 Fair market value + \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

	<b>Control Totals +</b>	
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## Noncash Contributions Exceeding \$500

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis + \_\_\_\_\_ [13]  
 Fair market value + \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

	<b>Control Totals +</b>	
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**NOTES/QUESTIONS:**

## Contributions of Motor Vehicles, Boats & Airplanes

Please provide all Forms 1098-C

Taxpayer/Spouse (T, S)			__ [1]
Donee's name	_____		[4]
State postal code	_____		[3]
Date of contribution <b>(Box 1)</b>	_____		[7]
Make and model of vehicle <b>(Box 2)</b>	_____		[8]
Year of vehicle <b>(Box 2)</b>	_____		[9]
Vehicle or other identification number <b>(Box 3)</b>	_____		[10]
Donee certifies that vehicle was sold in arm's length transaction to unrelated party <b>(Box 4a)</b>			__ [11]
Date of sale <b>(Box 4b)</b>	_____		[12]
Gross proceeds from sale <b>(Box 4c)</b>		+ _____	[13]
Donee certifies that vehicle will not be transferred for money, other property, or services before completion of material improvement or significant intervening use <b>(Box 5a)</b>			__ [14]
Donee certifies that vehicle is to be transferred to a needy individual for significantly below fair market value in furtherance of donee's charitable purpose <b>(Box 5b)</b>			__ [15]
Detailed description of material improvements or significant intervening use and duration of use <b>(Box 5c)</b>	_____		[16]
	_____		
	_____		
Did you provide goods or services in exchange for the vehicle? <b>(Box 6a)</b>	Yes	__ [17]	No
			__ [18]
Value of goods and services provided in exchange for the vehicle <b>(Box 6b)</b>		+ _____	[19]
Donee certifies that the goods and services consisted solely of intangible religious benefits <b>(Box 6c)</b>			__ [20]
Description of goods and services <b>(Box 6c)</b>	_____		[21]
	_____		
	_____		
Under the law, the donor may not claim a deduction of more than \$500 for this vehicle if this box is checked <b>(Box 7)</b>			__ [22]

### Other Information for Donated Property

Overall physical condition of property			[27]
Vehicle mileage on date of contribution	_____		[28]
Date property was acquired by donor	_____		[29]
How property was acquired by donor (P = Purchase, I = Inheritance, G = Gift, E = Exchange)			__ [30]
Donor's cost or basis		+ _____	[31]
Fair market value on date of contribution		+ _____	[32]
Method used to determine FMV (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other)			__ [33]
If other:	_____		[34]
Bargain sale amount received			[35]
Donee's address, and ZIP code	_____		[40]
	_____ [41]	_____ [42]	[43]
Donee's telephone number			[44]

**NOTES/QUESTIONS:**

## Casualty and Theft - Business/Income Producing Properties

Preparer use only

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [7]

### Casualty and Theft - Business/Income Producing Properties

Description of casualty or theft - Property A \_\_\_\_\_ [12]  
 Description of casualty or theft - Property B \_\_\_\_\_ [25]  
 Description of casualty or theft - Property C \_\_\_\_\_ [38]  
 Description of casualty or theft - Property D \_\_\_\_\_ [51]

	A	B	C	D
Property type (1 = Business, 2 = Income producing, 3 = Employee prop) ___	[15]	[28]	[41]	[54]
Date acquired	[19]	[32]	[45]	[58]
Cost or other basis of property	+ [20]	+ [33]	+ [46]	+ [59]
Insurance or other reimbursement	+ [21]	+ [34]	+ [47]	+ [60]
Fair market value before casualty	+ [22]	+ [35]	+ [48]	+ [61]
Fair market value after casualty	+ [23]	+ [36]	+ [49]	+ [62]

### Business/Income Use Replacement Information

Description of replacement property A \_\_\_\_\_ [63]  
 Description of replacement property B \_\_\_\_\_ [67]  
 Description of replacement property C \_\_\_\_\_ [71]  
 Description of replacement property D \_\_\_\_\_ [75]

	A	B	C	D
Mark if property was acquired from a related party	[64]	[68]	[72]	[76]
Date acquired	[65]	[69]	[73]	[77]
Cost of replacement property	+ [66]	+ [70]	+ [74]	+ [78]

**NOTES/QUESTIONS:**

Preparer use only

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [7]  
 Mark if casualty resulted due to a federally declared disaster. Federally declared disasters are determined by the President of the United States to warrant assistance by the Federal Government \_\_\_\_\_ [8]

**Casualty and Theft - Personal Use Properties**

Description of casualty or theft - Property A \_\_\_\_\_ [13]  
 Description of casualty or theft - Property B \_\_\_\_\_ [24]  
 Description of casualty or theft - Property C \_\_\_\_\_ [35]  
 Description of casualty or theft - Property D \_\_\_\_\_ [46]

	A	B	C	D
Date acquired	_____ [19]	_____ [30]	_____ [41]	_____ [52]
Cost or other basis of property	+ _____ [20]	+ _____ [31]	+ _____ [42]	+ _____ [53]
Insurance or other reimbursement	+ _____ [21]	+ _____ [32]	+ _____ [43]	+ _____ [54]
Fair market value before casualty	+ _____ [22]	+ _____ [33]	+ _____ [44]	+ _____ [55]
Fair market value after casualty	+ _____ [23]	+ _____ [34]	+ _____ [45]	+ _____ [56]

**Personal Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [57]  
 Description of replacement property B \_\_\_\_\_ [61]  
 Description of replacement property C \_\_\_\_\_ [65]  
 Description of replacement property D \_\_\_\_\_ [69]

	A	B	C	D
Mark if property was acquired from a related party	_____ [58]	_____ [62]	_____ [66]	_____ [70]
Date acquired	_____ [59]	_____ [63]	_____ [67]	_____ [71]
Cost of replacement property	+ _____ [60]	+ _____ [64]	+ _____ [68]	+ _____ [72]

**NOTES/QUESTIONS:**

Preparer use only

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [6]

**Prior Year Casualty and Theft - Business/Income Producing Properties (Cont'd)**

Description of casualty or theft - Property A \_\_\_\_\_ [8]  
 Description of casualty or theft - Property B \_\_\_\_\_ [17]  
 Description of casualty or theft - Property C \_\_\_\_\_ [26]  
 Description of casualty or theft - Property D \_\_\_\_\_ [35]

	A	B	C	D
Property type (1 = Business, 2 = Income producing, 3 = Employee prop) __	[9]	[18]	[27]	[36]
Date acquired	_____ [12]	_____ [21]	_____ [30]	_____ [39]
Cost or other basis of property	+ _____ [13]	+ _____ [22]	+ _____ [31]	+ _____ [40]
Insurance or other reimbursement	+ _____ [14]	+ _____ [23]	+ _____ [32]	+ _____ [41]
Fair market value before casualty	+ _____ [15]	+ _____ [24]	+ _____ [33]	+ _____ [42]
Fair market value after casualty	+ _____ [16]	+ _____ [25]	+ _____ [34]	+ _____ [43]

**Current Year Business/Income Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [44]  
 Description of replacement property B \_\_\_\_\_ [50]  
 Description of replacement property C \_\_\_\_\_ [56]  
 Description of replacement property D \_\_\_\_\_ [62]

	A	B	C	D
Date acquired	_____ [45]	_____ [51]	_____ [57]	_____ [63]
Prior year cost of replacement property	+ _____ [46]	+ _____ [52]	+ _____ [58]	+ _____ [64]
Cost of replacement property	+ _____ [47]	+ _____ [53]	+ _____ [59]	+ _____ [65]
Postponed gain	+ _____ [48]	+ _____ [54]	+ _____ [60]	+ _____ [66]
Adjusted basis of replacement property	+ _____ [49]	+ _____ [55]	+ _____ [61]	+ _____ [67]

**NOTES/QUESTIONS:**

Occurrence description \_\_\_\_\_ [1]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 State postal code \_\_\_\_\_ [3]  
 Date of casualty or theft \_\_\_\_\_ [4]

**Casualty and Theft - Personal Use Properties (Cont'd)**

Description of casualty or theft - Property A \_\_\_\_\_ [9]  
 Description of casualty or theft - Property B \_\_\_\_\_ [16]  
 Description of casualty or theft - Property C \_\_\_\_\_ [23]  
 Description of casualty or theft - Property D \_\_\_\_\_ [30]

	A	B	C	D
Date acquired	_____ [11]	_____ [18]	_____ [25]	_____ [32]
Cost or other basis of property	+ _____ [12]	+ _____ [19]	+ _____ [26]	+ _____ [33]
Insurance or other reimbursement	+ _____ [13]	+ _____ [20]	+ _____ [27]	+ _____ [34]
Fair market value before casualty	+ _____ [14]	+ _____ [21]	+ _____ [28]	+ _____ [35]
Fair market value after casualty	+ _____ [15]	+ _____ [22]	+ _____ [29]	+ _____ [36]

**Personal Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [37]  
 Description of replacement property B \_\_\_\_\_ [43]  
 Description of replacement property C \_\_\_\_\_ [49]  
 Description of replacement property D \_\_\_\_\_ [55]

	A	B	C	D
Date acquired	_____ [38]	_____ [44]	_____ [50]	_____ [56]
Prior year cost of replacement property	+ _____ [39]	+ _____ [45]	+ _____ [51]	+ _____ [57]
Cost of replacement property	+ _____ [40]	+ _____ [46]	+ _____ [52]	+ _____ [58]
Postponed gain	+ _____ [41]	+ _____ [47]	+ _____ [53]	+ _____ [59]
Adjusted basis of replacement property	+ _____ [42]	+ _____ [48]	+ _____ [54]	+ _____ [60]

**NOTES/QUESTIONS:**

**Preparer use only**

Principal business or profession \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

**Business Use of Home**

	2009 Information	Prior Year Information
Total area of home	_____ [10]	_____
Area used exclusively for business	_____ [12]	_____
Information for day-care facilities only:		
Total hours used for day-care during this year	_____ [14]	_____
Total hours used this year, if less than 8,760	_____ [16]	_____
Special computation for certain day-care facilities:		
Area used regularly and exclusively for day-care business	_____ [18]	_____
Area used partly for day-care business	_____ [20]	_____

**List as direct expenses any expenses which are attributable only to the business part of your home.**

**List as indirect expenses any expenses which are attributable to the overall upkeep and running of your home.**

	2009 Information		Prior Year Information
	Direct Expenses	Indirect Expenses	
Mortgage interest	+ _____ [25]	+ _____ [26]	_____
Mortgage insurance premiums	+ _____ [28]	+ _____ [29]	_____
Real estate taxes	+ _____ [31]	+ _____ [32]	_____
Excess mortgage interest and insurance premiums	+ _____ [34]	+ _____ [35]	_____
Insurance	+ _____ [37]	+ _____ [38]	_____
Rent	+ _____ [40]	+ _____ [41]	_____
Repairs & maintenance	+ _____ [43]	+ _____ [44]	_____
Utilities	+ _____ [46]	+ _____ [47]	_____
Other expenses, such as: Supplies & Security system	+ _____ [49]	+ _____ [50]	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
_____	+ _____	+ _____	_____
Excess casualty losses		+ _____ [52]	_____
Carryovers:			
Operating expenses		+ _____ [53]	_____
Casualty losses		+ _____ [54]	_____
Depreciation		+ _____ [56]	_____
Business expenses not from business use of home, such as:			
Travel, Supplies, Business telephone expenses		+ _____ [57]	_____
Depreciation		+ _____ [61]	_____

**NOTES/QUESTIONS:**

**If you used your automobile for business purposes, please complete the following information.**

**Preparer use only**

Description of business or profession \_\_\_\_\_ [3]

## Vehicles 1 - 2

Vehicle 1 - Date placed in service \_\_\_\_\_ [5]  
 Description \_\_\_\_\_ [6]  
 Comments \_\_\_\_\_

Vehicle 2 - Date placed in service \_\_\_\_\_ [41]  
 Description \_\_\_\_\_ [42]  
 Comments \_\_\_\_\_

	Vehicle 1	Prior Year Information	Vehicle 2	Prior Year Information
Total miles for the year	_____ [10]	_____	_____ [46]	_____
Commuting miles	_____ [12]	_____	_____ [48]	_____
Business miles	_____ [14]	_____	_____ [50]	_____
<b>Vehicle use questions:</b>				
Was the vehicle available for off-duty personal use? (Y, N)	___ [17]	___	___ [53]	___
Was another vehicle available for personal use? (Y, N)	___ [19]	___	___ [55]	___
Do you have evidence to support your deduction? (Y, N)	___ [21]	___	___ [57]	___
Is this evidence written? (Y, N)	___ [23]	___	___ [59]	___
Parking, fees and tolls	+ _____ [25]	_____	+ _____ [61]	_____
Gasoline, oil, repairs, insurance, etc.	+ _____ [27]	_____	+ _____ [63]	_____
Interest	+ _____ [29]	_____	+ _____ [65]	_____
Registration	+ _____ [31]	_____	+ _____ [67]	_____
Property taxes	+ _____ [33]	_____	+ _____ [69]	_____
Vehicle rentals	+ _____ [35]	_____	+ _____ [71]	_____
Inclusion amount <b>(Preparer use only)</b>	+ _____ [37]	_____	+ _____ [73]	_____
Depreciation	+ _____ [39]	_____	+ _____ [75]	_____

## Vehicles 3 - 4

Vehicle 3 - Date placed in service \_\_\_\_\_ [77]  
 Description \_\_\_\_\_ [78]  
 Comments \_\_\_\_\_

Vehicle 4 - Date placed in service \_\_\_\_\_ [113]  
 Description \_\_\_\_\_ [114]  
 Comments \_\_\_\_\_

	Vehicle 3	Prior Year Information	Vehicle 4	Prior Year Information
Total miles for the year	_____ [82]	_____	_____ [118]	_____
Commuting miles	_____ [84]	_____	_____ [120]	_____
Business miles	_____ [86]	_____	_____ [122]	_____
<b>Vehicle use questions:</b>				
Was the vehicle available for off-duty personal use? (Y, N)	___ [89]	___	___ [125]	___
Was another vehicle available for personal use? (Y, N)	___ [91]	___	___ [127]	___
Do you have evidence to support your deduction? (Y, N)	___ [93]	___	___ [129]	___
Is this evidence written? (Y, N)	___ [95]	___	___ [131]	___
Parking, fees and tolls	+ _____ [97]	_____	+ _____ [133]	_____
Gasoline, oil, repairs, insurance, etc.	+ _____ [99]	_____	+ _____ [135]	_____
Interest	+ _____ [101]	_____	+ _____ [137]	_____
Registration	+ _____ [103]	_____	+ _____ [139]	_____
Property taxes	+ _____ [105]	_____	+ _____ [141]	_____
Vehicle rentals	+ _____ [107]	_____	+ _____ [143]	_____
Inclusion amount <b>(Preparer use only)</b>	+ _____ [109]	_____	+ _____ [145]	_____
Depreciation	+ _____ [111]	_____	+ _____ [147]	_____

**Control Totals +**

## Social Security Tax on Unreported Tips

Complete if you received cash/charge tips of \$20 or less in a month in 2009.

	2009 Information		Prior Year Information
	Taxpayer	Spouse	
Total cash and charge tips under \$20 per month and not reported to employer	+ _____ [3]	+ _____ [4]	<div style="border: 1px solid black; width: 100%; height: 20px; background-color: #cccccc;"></div>

Complete if you received cash/charge tips of \$20 or more in a month and did not report all of those tips to your employer.

	Employer name	Employer identification number	Total tips received in 2009	Total tips reported in 2009
Taxpayer information[1]	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
Spouse information [2]	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

## Social Security Tax on Unreported Wages

Complete if you received pay from a firm for services performed not as an independent contractor and social security and Medicare taxes were not withheld from the pay.

(\*\*Please refer to Reason Codes located at the bottom)

	Firm name	Firm's federal identification number	Reason Code **	Date of IRS determination or correspondence received	Mark if 1099-MISC received	Total wages received with no social security or Medicare tax withheld
Taxpayer information[6]	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____
Spouse information[7]	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____
	_____	_____	_____	_____	-	_____

**Reason Codes \*\***

A = I filed Form SS-8 and received a determination letter stating that I am an employee of this firm.  
 B = I was designated as a "section 530 employee" by my employer or by the IRS prior to January 1, 1997.  
 C = I received other correspondence from the IRS that states I am an employee.  
 D = I was previously treated as an employee by this firm and am performing services in a substantially similar capacity and under substantially similar direction and control.  
 E = My co-workers performing substantially similar services under substantially similar direction and control are treated as employees.  
 F = My co-workers performing substantially similar services under substantially similar direction and control filed Form SS-8 for this firm and received a determination that they were employees.  
 G = I filed Form SS-8 with the IRS and have not received a reply.

State postal code \_\_\_\_\_ [13] Taxpayer \_\_\_\_\_ [14] Spouse

	Taxpayer	Spouse	Prior Year Information
If you received a parsonage provided by the church, please complete the following information:			
Fair rental value of parsonage provided by church	+ _____ [17]	+ _____ [18]	_____
Utilities allowance provided in addition to parsonage	+ _____ [20]	+ _____ [21]	_____
Actual parsonage utilities expense	+ _____ [23]	+ _____ [24]	_____
If you received a rental or parsonage allowance provided by the church, please complete the following information:			
Utilities allowance, if separate from parsonage allowance	+ _____ [29]	+ _____ [30]	_____
Actual parsonage expense	+ _____ [32]	+ _____ [33]	_____
Fair rental value of home	+ _____ [35]	+ _____ [36]	_____
Actual utilities expense	+ _____ [38]	+ _____ [39]	_____
Mark if you have claimed exemption from self-employment tax			
by filing Form 4361 with the IRS	_____ [41]	_____ [42]	
If you are a self-employed minister, enter any tax-deductible			
contributions to a 403(b) retirement plan	+ _____ [45]	+ _____ [46]	

**NOTES/QUESTIONS:**

**Enter parent's information for children under age 19 on 1/1/2010 or a full-time student under age 24 who have investment income of more than \$1,900.**

Parent's social security number (Enter the name and social security number of the parent listed first on the return) \_\_\_\_\_ [4]

Parent's first name \_\_\_\_\_ [5]

Parent's last name \_\_\_\_\_ [6]

Parent's filing status (1 = Single, 2 = Married/filing jointly, 3 = Married separately, 4 = Head of household, 5 = Qualifying widow(er)) \_\_\_\_\_ [7]

### All Other Children's Information

**Enter information for each child with investment income of more than \$1,900.**

Child #1 social security number \_\_\_\_\_ [23]

Child #1 first name \_\_\_\_\_ [24]

Child #1 last name \_\_\_\_\_ [25]

Child #1 birthdate (mm/dd/yyyy) \_\_\_\_\_ [26]

Child #2 social security number \_\_\_\_\_ [36]

Child #2 first name \_\_\_\_\_ [37]

Child #2 last name \_\_\_\_\_ [38]

Child #2 birthdate (mm/dd/yyyy) \_\_\_\_\_ [39]

Child #3 social security number \_\_\_\_\_ [49]

Child #3 first name \_\_\_\_\_ [50]

Child #3 last name \_\_\_\_\_ [51]

Child #3 birthdate (mm/dd/yyyy) \_\_\_\_\_ [52]

Child #4 social security number \_\_\_\_\_ [62]

Child #4 first name \_\_\_\_\_ [63]

Child #4 last name \_\_\_\_\_ [64]

Child #4 birthdate (mm/dd/yyyy) \_\_\_\_\_ [65]

Child #5 social security number \_\_\_\_\_ [75]

Child #5 first name \_\_\_\_\_ [76]

Child #5 last name \_\_\_\_\_ [77]

Child #5 birthdate (mm/dd/yyyy) \_\_\_\_\_ [78]

Child #6 social security number \_\_\_\_\_ [88]

Child #6 first name \_\_\_\_\_ [89]

Child #6 last name \_\_\_\_\_ [90]

Child #6 birthdate (mm/dd/yyyy) \_\_\_\_\_ [91]

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#### NOTES/QUESTIONS:

## Children's Interest Income

Please provide copies of all Form 1099-INT or other statements reporting child's interest income.  
Complete a separate Organizer Form ID: 8814 for each child.

Child's social security number \_\_\_\_\_ [1]  
 Child's date of birth \_\_\_\_\_ [2]  
 Child's name \_\_\_\_\_ [4]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]

Type Code (**See codes below)	Payer		Interest <sup>[6]</sup> Income	Tax Exempt Income	U.S. Obligations Percent	Tax Exempt Percent	Prior Year Information
—	_____	+	_____	_____	_____	_____	
—	_____	+	_____	_____	_____	_____	
—	_____	+	_____	_____	_____	_____	
—	_____	+	_____	_____	_____	_____	
—	_____	+	_____	_____	_____	_____	
—	_____	+	_____	_____	_____	_____	

<b>**Interest Codes</b>
Blank = Regular Interest    3 = Nominee Distribution    4 = Accrued Interest    5 = OID Adjustment    6 = ABP Adjustment

## Children's Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting child's dividend income.

Type Code (** See codes below)	Ordinary <sup>[8]</sup> Dividends	Qualified Dividends	Total Capital Gain Distributions			28% Capital Gain	Tax Exempt Dividends	U.S. Obligations Percent	Tax Exempt Percent	Prior Year Information
			Section 1250	Section 1202						
<b>1</b>	Payer									
	Amounts +									
<b>2</b>	Payer									
	Amounts +									
<b>3</b>	Payer									
	Amounts +									
<b>4</b>	Payer									
	Amounts +									
<b>5</b>	Payer									
	Amounts +									
<b>6</b>	Payer									
	Amounts +									

<b>**Dividend Codes</b>
Blank = Other                      3 = Nominee

Alaska Permanent Fund dividends:

	2009 Information <sup>[10]</sup>	Prior Year Information
_____	+ _____	
_____	+ _____	

**Complete if you paid cash wages of \$1,000 or more to any household employee.**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Employer identification number \_\_\_\_\_ [2]

Total cash wages subject to social security taxes + \_\_\_\_\_ [4]  
 Total cash wages subject to Medicare taxes + \_\_\_\_\_ [5]  
 Federal income tax withheld + \_\_\_\_\_ [6]  
 State disability plan social security & Medicare withheld + \_\_\_\_\_ [7]  
 Advance earned income credit (EIC) payments + \_\_\_\_\_ [8]

Did you:  
 (A) pay any household employee cash wages of \$1,700 or more in 2009? (Y, N) \_\_\_\_\_ [9]  
 (B) withhold Federal income tax for any household employee? (Y, N) \_\_\_\_\_ [10]  
 (C) pay household employees cash wages equal to or greater than \$1,000 in any quarter of 2008 or 2009? (Y, N) \_\_\_\_\_ [11]

**Federal Unemployment (FUTA) Tax****If you answered "Yes" to question (C) above, complete the following information.****Complete only items marked with an asterisk (\*) if total cash wages subject to FUTA tax amount is also taxable as defined by your State act and unemployment contributions are paid to only one State.**

Total cash wages subject to FUTA tax \* + \_\_\_\_\_ [12]  
 Did you pay all state unemployment contributions for 2009 by 4/15/10? (Y, N) \* \_\_\_\_\_ [13]

State #1 information  
 State postal code where you have to pay unemployment contributions \* \_\_\_\_\_ [14]  
 State reporting number as shown on state unemployment tax return \* \_\_\_\_\_ [15]  
 Taxable wages (as defined in state act) + \_\_\_\_\_ [16]  
 State experience rate period:  
 From \_\_\_\_\_ [17]  
 To \_\_\_\_\_ [18]  
 State experience rate (xxx.xx) \_\_\_\_\_ [19]  
 Contributions paid to state unemployment fund \* + \_\_\_\_\_ [20]

State #2 information  
 State postal code where you have to pay unemployment contributions \_\_\_\_\_ [21]  
 State reporting number as shown on state unemployment tax return \_\_\_\_\_ [22]  
 Taxable wages (as defined in state act) + \_\_\_\_\_ [23]  
 State experience rate period:  
 From \_\_\_\_\_ [24]  
 To \_\_\_\_\_ [25]  
 State experience rate (xxx.xx) \_\_\_\_\_ [26]  
 Contributions paid to state unemployment fund + \_\_\_\_\_ [27]

**NOTES/QUESTIONS:**

## Child and Dependent Care Expenses

**Please enter all amounts paid in 2009 for the care of one or more dependents which enables you to work or attend school.  
Enter the amount of dependent care expenses paid for each qualifying dependent on Organizer Form ID:1040**

	Taxpayer	Spouse
2008 employer-provided dependent care benefits used during 2009 grace period	+ _____ [3]	+ _____ [4]
Employer-provided dependent care benefits that were forfeited in 2009	+ _____ [5]	+ _____ [6]
Total qualified expenses incurred in 2009		_____ [9]
Were you or your spouse a full time student or disabled? (Yes or No)	_____ [10]	_____ [11]
Did you provide care expenses for any person(s) who is not listed as a dependent? (Y, N)		_____ [12]

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_ [7]

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

Name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider) \_\_\_\_\_

Amount paid to care provider in 2009 + \_\_\_\_\_

**Credit For The Elderly or Disabled**

Please complete if you were age 65 or older at the end of 2009, OR you were under age 65 and retired under total and permanent disability, and you received taxable disability income.

	Taxpayer	Spouse
Nontaxable disability/pension income received in 2009	+ _____ [7]	+ _____ [8]
Taxable disability income received in 2009	+ _____ [9]	+ _____ [10]

**NOTES/QUESTIONS:**

**Residential Energy Credit**

**The Energy Tax Incentives Act of 2005 provides credits for energy efficient improvements made to personal residences beginning in 2006. There are certain restrictions and limits but some of the home improvements that may qualify include, solar electric, solar water heating**

Taxpayer/Spouse/Joint (T, S, J)	_____	[1]
Were the costs incurred made to your main home located in the United States? (Y, N)	_____	[2]
Enter the total amount of costs for insulation material or system to reduce heat loss or gain	+ _____	[3]
Enter the total amount of cost for exterior windows	+ _____	[4]
Enter the total amount of costs for exterior doors	+ _____	[5]
Enter the total amount of costs for qualified metal roofs	+ _____	[6]
Enter the total amount of costs for energy-efficient building property	+ _____	[7]
Enter the total amount of costs for qualified natural gas, propane, or oil furnace or hot water boilers	+ _____	[8]
Enter the total amount of costs for advanced main circulating fan used in a natural gas, propane, or oil furnace	+ _____	[9]
Enter the total amount of costs for qualified solar electric property	+ _____	[10]
Enter the total amount of costs for qualified solar water heating property	+ _____	[11]
Enter the total amount of costs for qualified small wind energy property	+ _____	[12]
Enter the total amount of costs for qualified geothermal heat pump property	+ _____	[13]
Enter the total amount of costs for qualified fuel cell property	+ _____	[14]
Enter the total amount of kilowatt capacity of the qualified fuel cell property	_____	[15]

**NOTES/QUESTIONS:**

If you or your spouse purchased a principal residence after December 31, 2008, and before May 1, 2010, you may qualify for the First-Time Homebuyer Credit. The home must be located within the United States and neither party may have owned, or held an ownership interest in a home during the three year period prior to the home's purchase date. If you owned and lived in a home for five consecutive years during an eight year period prior to the purchase of a new home, you may qualify for a reduced credit even though you are not a first-time homebuyer. If you a member of the U.S. uniformed services, Foreign Service, or intelligence community and have qualifying overseas duty during 2009, the purchase cut-off date is extended to May 1, 2011. If your home was purchased before May 1, 2010, you may enter your information. If you claimed a First-Time Homebuyer credit in 2008 and the home is no longer your main home, you may have to repay the credit.

Mark if you or your spouse served at least 3 months of qualified overseas duty as a member of the military, Foreign Service, or intelligence corps in 2009 \_\_[2]

Principal residence address, if different from home address on Organizer Form ID: 1040

Address \_\_\_\_\_ [3]

City/State/Zip code \_\_\_\_\_ [4] \_\_\_\_ [5] \_\_\_\_\_ [6]

Date home acquired (After 4/8/08 and before 5/1/10) (After 11/30/09 and before 5/1/11 for service members) \_\_\_\_\_ [7]

Purchase price of the home \_\_\_\_\_ [9]

Date the home was sold or ceased being used as principal residence \_\_\_\_\_ [10]

In the period three years prior to the purchase date had the:

Taxpayer owned a home or had ownership interest in a home? (Y, N) \_\_ [12]

Spouse owned a home or had ownership interest in a home? (Y, N) \_\_ [13]

If you were an owner of a home and purchased a new home after November 6, 2009:

Taxpayer used the same residence as home for 5 consecutive years? (Y, N) \_\_ [14]

Spouse used the same residence as home for 5 consecutive years? (Y, N) \_\_ [15]

Were you and your spouse married on the purchase date? (Y, N) \_\_ [16]

Mark if home was either purchased from a related party, is located outside the United States, or was acquired by gift or inheritance \_\_ [17]

If you own the principal residence with another person enter their name and allocation percentage

Other owner name \_\_\_\_\_ [20]

Allocation percentage \_\_\_\_\_

If you sold your home, enter the selling price \_\_\_\_\_ [25]

If your home was transferred to your ex-spouse due to a divorce settlement, enter his or her full name \_\_\_\_\_ [26]

---

**NOTES/QUESTIONS:**

# Adoption Credit

**Complete this form if you paid qualified adoption expenses in 2009 AND the adoption was final in or before 2009.  
 Qualified adoption expenses include adoption fees, attorney fees, court costs, and travel expenses while away from home.**

	Child 1 <sup>[1]</sup>	Child 2	Child 3
Taxpayer/Spouse/Joint (T, S, J)	_____	_____	_____
First name	_____	_____	_____
Last name	_____	_____	_____
Child's date of birth	_____	_____	_____
Mark if this child was:			
born before '92 and was disabled	_____	_____	_____
a child with special needs	_____	_____	_____
a foreign child	_____	_____	_____
Child's identifying number	_____	_____	_____
Total qualified adoption expenses paid in 2008 for this child	_____	_____	_____
Employer-provided benefits received in 2008 for this child	_____	_____	_____
Total qualified adoption expenses paid in 2009 for this child	_____	_____	_____
Employer-provided benefits received in 2009 for this child	_____	_____	_____
Adoption final in (1 = '09, 2 = Pre '09)	_____	_____	_____

	Child 4	Child 5	Child 6
Taxpayer/Spouse/Joint (T, S, J)	_____	_____	_____
First name	_____	_____	_____
Last name	_____	_____	_____
Child's date of birth	_____	_____	_____
Mark if this child was:			
born before '92 and was disabled	_____	_____	_____
a child with special needs	_____	_____	_____
a foreign child	_____	_____	_____
Child's identifying number	_____	_____	_____
Total qualified adoption expenses paid in 2008 for this child	_____	_____	_____
Employer-provided benefits received in 2008 for this child	_____	_____	_____
Total qualified adoption expenses paid in 2009 for this child	_____	_____	_____
Employer-provided benefits received in 2009 for this child	_____	_____	_____
Adoption final in (1 = '09, 2 = Pre '09)	_____	_____	_____

Adoption credit carryover from 2004	+	_____ [2]
Adoption credit carryover from 2005	+	_____ [3]
Adoption credit carryover from 2006	+	_____ [4]
Adoption credit carryover from 2007	+	_____ [5]
Adoption credit carryover from 2008	+	_____ [6]

If the adoption was incomplete or unsuccessful please provide information below:

	[10]
	[11]
	[12]

**NOTES/QUESTIONS:**

**\*Select the Type of Use codes from the chart below**

	Type of Use*	Rate	Gallons
<b>Nontaxable use of gasoline -</b>			
Off-highway business use		\$0.183	+ _____ [1]
Use on a farm		0.183	+ _____ [2]
Other nontaxable use	____ [3]	0.183	+ _____ [4]
Exported		0.184	+ _____ [5]
<b>Nontaxable use of aviation gasoline -</b>			
Commercial aviation		0.15	+ _____ [6]
Other nontaxable use	____ [7]	0.193	+ _____ [8]
Exported		0.194	+ _____ [9]
Leaking underground storage tank (LUST) tax		0.001	+ _____ [10]
<b>Nontaxable use of undyed diesel fuel -</b>			
Explanation of evidence of dyes:			_____ [11]
_____			
_____			
Other nontaxable use	____ [12]	0.243	+ _____ [13]
Use on a farm		0.243	+ _____ [14]
Trains		0.243	+ _____ [15]
Intercity / local bus		0.17	+ _____ [16]
Exported		0.244	+ _____ [17]
<b>Nontaxable use of undyed kerosene (other than aviation) -</b>			
Explanation of evidence of dyes:			_____ [18]
_____			
_____			
Other nontaxable use	____ [19]	0.243	+ _____ [20]
Use on a farm		0.243	+ _____ [21]
Intercity / local buses		0.17	+ _____ [22]
Exported		0.244	+ _____ [23]
Other nontaxable use taxed at \$.044	____ [24]	0.243	+ _____ [25]
Other nontaxable use taxed at \$.219	____ [26]	0.243	+ _____ [27]
<b>Kerosene used in aviation -</b>			
Kerosene taxed at \$.244		0.17	+ _____ [28]
Kerosene taxed at \$.219		0.244	+ _____ [29]
Other nontaxable use taxed at \$.244	____ [30]	0.243	+ _____ [31]
Other nontaxable use taxed at \$.219/.044	____ [32]	0.243	+ _____ [33]
Leaking underground storage tank (LUST) tax		0.001	+ _____ [34]

*Type of Use	
1 = Farming purposes	8 = Diesel & Kerosene fuel other than train or highway vehicle
2 = Off highway business use	9 = Foreign trade
3 = Export	10 = Certain helicopter and fixed wing air ambulance uses
4 = Commercial fishing	11 = Aviation fuel other than propulsion engines
5 = Intercity/local bus	13 = Exclusive use by a nonprofit educational organization
6 = In a qualified local bus	14 = Exclusive use by a state, political subdivision or DC
7 = School bus	15 = In an aircraft or vehicle owned by an aircraft museum

**NOTES/QUESTIONS:**

\*Select the Type of Use codes from the chart below

Type of Use*	Rate	Gallons
<b>Sales by registered ultimate vendors of undyed diesel fuel -</b>		
Registration Number		_____ [1]
Explanation of evidence of dyes:		_____ [2]
_____ [2]		
_____ [2]		
State / local government	0.243	+ _____ [3]
Intercity / local buses	0.17	+ _____ [4]
<b>Sales by registered ultimate vendors of undyed kerosene -</b>		
Registration Number		_____ [5]
Explanation of evidence of dyes:		_____ [6]
_____ [6]		
_____ [6]		
Use by state/local government	0.243	+ _____ [7]
Sales from a blocked pump	0.243	+ _____ [8]
Intercity / local buses	0.17	+ _____ [9]
<b>Sales by registered ultimate vendors of kerosene in aviation -</b>		
Registration Number		_____ [10]
Commercial aviation taxed at \$.219 (Other than foreign trade)	0.175	+ _____ [11]
Commercial aviation taxed at \$.244 (Other than foreign trade)	0.200	+ _____ [12]
Nonexempt use in noncommercial aviation	0.025	+ _____ [13]
Other nontaxable uses taxed at \$.244 _____ [14]	0.243	+ _____ [15]
Other nontaxable uses taxed at \$.219/.044 _____ [16]	0.218	+ _____ [17]
Leaking underground storage tank (LUST) tax	0.001	+ _____ [18]
<b>Alcohol fuel mixture credit -</b>		
Registration Number		_____ [20]
Mixtures containing ethanol	0.51	+ _____ [21]
Mixtures containing alcohol (Other than ethanol)	0.60	+ _____ [22]
<b>Biodiesel or renewable diesel mixture credit -</b>		
Registration Number		_____ [23]
Biodiesel mixtures	0.50	+ _____ [24]
Agri-biodiesel mixtures	1.00	+ _____ [25]
Renewable diesel mixtures	1.00	+ _____ [26]

*Type of Use	
1 = Farming purposes	8 = Diesel & Kerosene fuel other than train or highway vehicle
2 = Off highway business use	9 = Foreign trade
3 = Export	10 = Certain helicopter and fixed wing air ambulance uses
4 = Commercial fishing	11 = Aviation fuel other than propulsion engines
5 = Intercity/local bus	13 = Exclusive use by a nonprofit educational organization
6 = In a qualified local bus	14 = Exclusive use by a state, political subdivision or DC
7 = School bus	15 = In an aircraft or vehicle owned by an aircraft museum

**NOTES/QUESTIONS:**

\*Select the Type of Use codes from the chart below

	Type of Use*	Rate	Gallons
<b>Nontaxable use of alternative fuel -</b>			
Liquified petroleum gas (LPG)	___[1]	0.183	+ _____[2]
"P Series" fuels	___[3]	0.183	+ _____[4]
Compressed natural gas (CNG)	___[5]	0.183	+ _____[6]
Liquified hydrogen	___[7]	0.183	+ _____[8]
Any liquid fuel derived from coal through the Fischer-Tropsch process	___[9]	0.243	+ _____[10]
Liquid hydrocarbons derived from biomass	___[11]	0.243	+ _____[12]
Liquified natural gas (LNG)	___[13]	0.243	+ _____[14]
Liquified gas derived from biomass	___[15]	0.243	+ _____[16]
<b>Alternative fuel credit and alternative fuel mixture credit -</b>			
Registration Number			_____ [17]
Liquified petroleum gas (LPG)		0.50	+ _____[18]
"P Series" fuels		0.50	+ _____[19]
Compressed natural gas		0.50	+ _____[20]
Liquified hydrogen		0.50	+ _____[21]
Any liquid fuel derived from coal through the Fischer-Tropsch process		0.50	+ _____[22]
Liquid hydrocarbons derived from biomass		0.50	+ _____[23]
<b>Liquified natural gas (LNG)</b>		<b>0.50</b>	<b>+ _____[24]</b>
Liquified gas derived from biomass		0.50	+ _____[25]
Compressed gas derived from biomass		0.50	+ _____[26]
<b>Registered credit card users -</b>			
Registration Number			_____ [27]
Diesel for state / local government		0.243	+ _____[28]
Kerosene for state / local government		0.243	+ _____[29]
Kerosene for aviation use by state / local gov't taxed at \$.219/.044		0.218	+ _____[30]
<b>Nontaxable use of a diesel-water fuel emulsion -</b>			
Other nontaxable use	___[31]	0.197	+ _____[32]
Exported		0.198	+ _____[33]
<b>Diesel-water fuel emulsion blending -</b>			
Registration Number			_____ [34]
Blender credit		0.046	+ _____[35]
<b>Exported dyed fuels -</b>			
Exported dyed diesel fuel		0.046	+ _____[36]
Exported dyed kerosene		0.046	+ _____[37]

*Type of Use	
1 = Farming purposes	8 = Diesel & Kerosene fuel other than train or highway vehicle
2 = Off highway business use	9 = Foreign trade
3 = Export	10 = Certain helicopter and fixed wing air ambulance uses
4 = Commercial fishing	11 = Aviation fuel other than propulsion engines
5 = Intercity/local bus	13 = Exclusive use by a nonprofit educational organization
6 = In a qualified local bus	14 = Exclusive use by a state, political subdivision or DC
7 = School bus	15 = In an aircraft or vehicle owned by an aircraft museum

**NOTES/QUESTIONS:**

## Foreign Tax Credit

**Complete if you paid or accrued foreign taxes to a foreign country or U.S. possession in 2009.**

**Preparer use only**

Description \_\_\_\_\_ [2]  
 Taxpayer/Spouse (T, S) \_\_\_\_\_ [3]  
 Taxes claimed (1 = Paid, 2 = Accrued) \_\_\_\_\_ [6]  
 Category of income\* \_\_\_\_\_ [7]  
 Country of residence \_\_\_\_\_ [8]  
 Description of income \_\_\_\_\_ [9]

*Category of Income	
A = Passive category income	D = Certain income re-sourced by treaty
B = General category income	E = Lump-sum distributions
C = Section 901(j) income	

### Foreign Income or Loss

	A	B	C
Name of country	_____ [13]	_____ [14]	_____ [15]
Foreign gross income	+ _____ [16]	+ _____ [17]	+ _____ [18]
Definitely related expenses:			
_____	+ _____ [19]	+ _____ [20]	+ _____ [21]
_____	+ _____	+ _____	+ _____
_____	+ _____	+ _____	+ _____
_____	+ _____	+ _____	+ _____
Foreign source losses	+ _____ [22]	+ _____ [23]	+ _____ [24]

### Foreign Taxes Paid or Accrued

	A	B	C
Foreign taxes paid or accrued:			
Date paid or accrued	_____ [25]	_____ [26]	_____ [27]
In foreign currency - taxes withheld on:			
Dividends	+ _____ [28]	+ _____ [29]	+ _____ [30]
Rents & royalties	+ _____ [31]	+ _____ [32]	+ _____ [33]
Interest	+ _____ [34]	+ _____ [35]	+ _____ [36]
Other foreign taxes	+ _____ [37]	+ _____ [38]	+ _____ [39]
In US dollars - taxes withheld on:			
Dividends	+ _____ [43]	+ _____ [44]	+ _____ [45]
Rents & Royalties	+ _____ [46]	+ _____ [47]	+ _____ [48]
Interest	+ _____ [49]	+ _____ [50]	+ _____ [51]
Other foreign taxes	+ _____ [52]	+ _____ [53]	+ _____ [54]

**NOTES/QUESTIONS:**

**Preparer use only**

Description \_\_\_\_\_  
 Taxpayer/Spouse (T, S) \_\_\_\_\_  
 Category of income\* \_\_\_\_\_

*Category of Income	
<b>A = Passive category income</b>	<b>D = Certain income re-sourced by treaty</b>
<b>B = General category income</b>	<b>E = Lump-sum distributions</b>
<b>C = Section 901(j) income</b>	

**AMT Foreign Income or Loss**

	A	B	C
Name of country	_____	_____	_____
Foreign gross income	+ _____ [8]	+ _____ [9]	+ _____ [10]
Definitely related expenses	+ _____ [11]	+ _____ [12]	+ _____ [13]
Foreign source losses	+ _____ [14]	+ _____ [15]	+ _____ [16]

**NOTES/QUESTIONS:**

**Instructions**

Enter carryovers as positive numbers.  
 Enter utilizations as negative numbers.  
 Enter utilizations only for those losses shown on organizer form.  
 Enter carrybacks as reductions of loss in the year the loss was created, rather than as utilizations in carryback years.

Indefinite Carryovers	2008 to 2009 Amounts
Excess section 179 for Sch A	+ _____ [1]
Minimum tax credit	+ _____ [2]
Investment interest	+ _____ [3]
Investment interest - AMT	+ _____ [4]
Short-term capital loss	+ _____ [5]
Short-term capital loss - AMT	+ _____ [6]
Long-term capital loss	+ _____ [7]
Long-term capital loss - AMT	+ _____ [8]
Residential energy credit	+ _____ [9]
D.C. first-time homebuyer credit	+ _____ [10]
Tax credit bonds	+ _____ [11]

**5 Year Carryover Items**

Prior C/O Year	Section 1231 Nonrecaptured Losses	AMT Section 1231 Nonrecaptured Losses	50% Contributions	30% Contributions	30% Cap Gain Property to 50% Org	20% Contributions
2004	+ _____ [12]	+ _____ [17]	+ _____ [22]	+ _____ [27]	+ _____ [32]	+ _____ [37]
2005	+ _____ [13]	+ _____ [18]	+ _____ [23]	+ _____ [28]	+ _____ [33]	+ _____ [38]
2006	+ _____ [14]	+ _____ [19]	+ _____ [24]	+ _____ [29]	+ _____ [34]	+ _____ [39]
2007	+ _____ [15]	+ _____ [20]	+ _____ [25]	+ _____ [30]	+ _____ [35]	+ _____ [40]
2008	+ _____ [16]	+ _____ [21]	+ _____ [26]	+ _____ [31]	+ _____ [36]	+ _____ [41]

**NOL and Other Carryover Items**

Prior C/O Year	Net Operating Loss	AMT NOL	50% Qualified Conservation Contributions	100% Qualified Conservation Contributions
1994	+ _____ [42]	+ _____ [57]		
1995	+ _____ [43]	+ _____ [58]		
1996	+ _____ [44]	+ _____ [59]		
1997	+ _____ [45]	+ _____ [60]		
1998	+ _____ [46]	+ _____ [61]		
1999	+ _____ [47]	+ _____ [62]		
2000	+ _____ [48]	+ _____ [63]		
2001	+ _____ [49]	+ _____ [64]		
2002	+ _____ [50]	+ _____ [65]		
2003	+ _____ [51]	+ _____ [66]		
2004	+ _____ [52]	+ _____ [67]		
2005	+ _____ [53]	+ _____ [68]		
2006	+ _____ [54]	+ _____ [69]	+ _____ [72]	+ _____ [75]
2007	+ _____ [55]	+ _____ [70]	+ _____ [73]	+ _____ [76]
2008	+ _____ [56]	+ _____ [71]	+ _____ [74]	+ _____ [77]

**NOTES/QUESTIONS:**

Prior C/O Year	General Business Credit	Empowerment Zone Credit	Alcohol Fuel Credit	Renewable Electricity & Coal Production Credit	Work Opportunity Credit	Employer S.S. & Medicare Taxes Paid on Tips
1994	+ _____ [1]	+ _____ [16]				
1995	+ _____ [2]	+ _____ [17]				
1996	+ _____ [3]	+ _____ [18]				
1997	+ _____ [4]	+ _____ [19]				
1998	+ _____ [5]	+ _____ [20]				
1999	+ _____ [6]	+ _____ [21]				
2000	+ _____ [7]	+ _____ [22]				
2001	+ _____ [8]	+ _____ [23]				
2002	+ _____ [9]	+ _____ [24]				
2003	+ _____ [10]	+ _____ [25]				
2004	+ _____ [11]	+ _____ [26]		+ _____ [56]		
2005	+ _____ [12]	+ _____ [27]	+ _____ [42]	+ _____ [57]		
2006	+ _____ [13]	+ _____ [28]	+ _____ [43]	+ _____ [58]		
2007	+ _____ [14]	+ _____ [29]	+ _____ [44]	+ _____ [59]	+ _____ [74]	+ _____ [89]
2008	+ _____ [15]	+ _____ [30]	+ _____ [45]	+ _____ [60]	+ _____ [75]	+ _____ [90]

Prior C/O Year	Low-income Housing - Post 07	Rehabilitation & Energy Credit	Railroad Track Maintenance Credit
2008	+ _____ [105]	+ _____ [120]	+ _____ [135]

**NOTES/QUESTIONS:**

General: 1040 **Personal Information**

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) \_\_\_\_\_  
 Mark if you were married but living apart all year \_\_\_\_\_

	Taxpayer	Spouse
Social security number	_____	_____
First name	_____	_____
Last name	_____	_____
Occupation	_____	_____
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)	_____	_____
Mark if legally blind	_____	_____
Mark if dependent of another taxpayer	_____	_____
Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N)	_____	_____
Date of birth	_____	_____
Date of death	_____	_____
Work/daytime telephone number/ext number	_____	_____
Do you authorize us to discuss your return with the IRS (Y, N)	_____	_____

General: 1040, Contact **Present Mailing Address**

Address \_\_\_\_\_  
 Apartment number \_\_\_\_\_  
 City/State postal code/Zip code \_\_\_\_\_  
 Home/evening telephone number \_\_\_\_\_  
 Taxpayer email address \_\_\_\_\_  
 Spouse email address \_\_\_\_\_

General: 1040 **Dependent Information**

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months lived in your home	Care expenses paid for dependent
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Credits: 2441 **Child and Dependent Care Expenses**

	Provider #1	Provider #2
Provider information:		
Name	_____	_____
Street address	_____	_____
City, state, and zip code	_____	_____
Social security number OR Employer identification number	_____	_____
Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP)	_____	_____
Amount paid to care provider in 2009	_____	_____
	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited	_____	_____

General: Info **Direct Deposit/Electronic Funds Withdrawal Information**

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial institution routing transit number \_\_\_\_\_  
 Name of financial institution \_\_\_\_\_  
 Your account number \_\_\_\_\_ Type of account (1 = Savings, 2 = Checking, 3 = IRA\*, 4 = Savings Bonds) \_\_\_\_\_

\*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Income: W2 **Salary and Wages**

Please provide all copies of Form W-2 that you receive.

Below is a list of the W-2's as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: 1099R **Pension, IRA, and Annuity Distributions**

Please provide all copies of Form 1099-R that you receive.

Below is a list of the 1099-R's as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: K1, K1T **Schedule K-1s**

Please provide all copies of Schedule K-1s that you receive.

Below is a list of the K-1s as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: W2G **Gambling Income**

Please provide all copies of Form W-2G that you receive.

Below is a list of the W-2Gs as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___

Educate: 1099Q **Qualified Education Plan Distributions**

Please provide all copies of Form 1099-Q that you receive.

Below is a list of the 1099-Q's as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___

Credits: Cr-4 **Making Work Pay and Government Retiree Credit**

Enter the amount of the economic recovery payment you received below.

	Taxpayer	Spouse
Economic recovery payment received in 2009 (Do not enter more than \$250 per person)	_____	_____
Did you receive a government pension or annuity but not qualify for Social Security benefits? (Y/N)	___	___



Income: B1 **Interest Income**

Please provide all copies of Form 1099-INT.

T/S/J	Payer Name	Interest Income	Prior Year Information
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income: B3 **Seller Financed Mortgage Interest**

T, S, J  Payer's name \_\_\_\_\_ Payer's social security number \_\_\_\_\_  
 Payer's address \_\_\_\_\_ Amount received in 2009 \_\_\_\_\_ Amount received in 2008 \_\_\_\_\_  
 Amount received in 2009 \_\_\_\_\_ Amount received in 2008 \_\_\_\_\_

Income: B2 **Dividend Income**

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Income: D **Sales of Stocks, Securities, and Other Investment Property**

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Income: Income **Other Income**

Please provide copies of all supporting documentation.

	2009 Information		Prior Year Information
	Taxpayer	Spouse	Prior Year Information
State and local income tax refunds	_____	_____	_____
Alimony received	_____	_____	_____
Unemployment compensation	_____	_____	_____
Unemployment compensation repaid	_____	_____	_____
Social security benefits	_____	_____	_____
Medicare premiums to be reported on Schedule A	_____	_____	_____
Railroad retirement benefits	_____	_____	_____

T/S/J	2009 Information	Prior Year Information
Other Income:	_____	_____
_____	_____	_____
_____	_____	_____

1040 Adj: IRA

### Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

Taxpayer

Spouse

**Traditional IRA Contributions for 2009 -**

If you want to contribute the maximum allowable traditional IRA contribution amount,

enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)

Enter the total traditional IRA contributions made for use in 2009

**Roth IRA Contributions for 2009 -**

Mark if you want to contribute the maximum Roth IRA contribution

Enter the total Roth IRA contributions made for use in 2009

Educate: Educate

### Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2009 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2009 Information	Prior Year Information
___	_____	_____	_____
___	_____	_____	_____

Complete this section if you paid qualified education expenses for higher education costs in 2009.

Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.

Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____

\*Education Expense Code: 1 = Hope credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction

The student qualifies for the Hope Credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has had no drug convictions in 2009.

1040 Adj: 3903

### Job Related Moving Expenses

Complete this section if you moved to a new home because of a new principal work place.

Description of move	_____
Taxpayer/Spouse/Joint (T, S, J)	_____
Mark if the move was due to service in the armed forces	___
Number of miles from old home to new workplace	_____
Number of miles from old home to old workplace	_____
Mark if move is outside United States or its possessions	___
Transportation and storage expenses	_____
Travel and lodging (not including meals)	_____
Total amount reimbursed for moving expenses	_____

1040 Adj: OtherAdj

### Other Adjustments to Income

Alimony Paid:

T/S	Recipient name	Recipient SSN	2009 Information	Prior Year Information
___	_____	_____	_____	_____
<b>Address</b> _____		<b>City</b> _____	<b>State</b> ___	<b>Zip code</b> _____

Taxpayer

Spouse

Prior Year Information

Educator expenses:

_____	_____	_____	_____
-------	-------	-------	-------

Other adjustments:

_____	_____	_____	_____
_____	_____	_____	_____

Itemized: A1 **Medical and Dental Expenses**

T/S/J		2009 Information	Prior Year Information
—	Medical and dental expenses	_____	_____
—	Medical insurance premiums you paid	_____	_____
—	Long-term care premiums you paid	_____	_____
—	Prescription medicines and drugs	_____	_____
—	Miles driven for medical items	_____	_____

Itemized: A1 **Tax Expenses**

T/S/J		2009 Information	Prior Year Information
—	State/local income taxes paid	_____	_____
—	2008 state and local income taxes paid in 2009	_____	_____
—	Sales tax paid on actual expenses	_____	_____
—	Real estate taxes paid	_____	_____
—	Personal property taxes	_____	_____
—	Other taxes	_____	_____

  

T/S/J	Description of new motor vehicle purchased between 2/17/09 - 12/31/09:	Date	Purchase Price (Before Taxes)	Sales/Excise Tax Paid
—	_____	_____	_____	_____

Itemized: A2 **Interest Expenses**

T/S/J		2009 Information	Prior Year Information
—	Home mortgage interest: From Form 1098	_____	_____

  

T/S/J	Name	SSN	2009 Information	Prior Year Information
—	_____	_____	_____	_____
—	Address _____	_____	_____	_____

  

T/S/J		2009 Information	Prior Year Information
—	Investment interest expense, other than on K-1s:	_____	_____

  

T/S/J	Description	Refinance #1	Refinance #2
—	_____	_____	_____
—	Total points paid	_____	_____
—	Date of refinance	_____	_____
—	Total number of payments	_____	_____
—	Reported on Form 1098 in 2009	_____	_____

Itemized: A3 **Charitable Contributions**

T/S/J		2009 Information	Prior Year Information
—	Contributions made by cash or check	_____	_____
—	Volunteer miles driven	_____	_____
—	Noncash items, such as: Goodwill, Salvation Army	_____	_____

Itemized: A3 **Miscellaneous Deductions**

T/S/J		2009 Information	Prior Year Information
—	Unreimbursed expenses	_____	_____
—	Union dues	_____	_____
—	Tax preparation fees	_____	_____
—	Other expenses, subject to 2% AGI limitation:	_____	_____
—	_____	_____	_____
—	Safe deposit box rental	_____	_____
—	Investment expenses, other than on K1s:	_____	_____
—	Other expenses, not subject to the 2% AGI limitation:	_____	_____
—	_____	_____	_____
—	Gambling losses: (Enter only if you have gambling income)	_____	_____



## Depreciation - Asset Acquisitions

Preparer use only

Activity name \_\_\_\_\_

**Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.**

		Description of Asset Acquired	Date Acquired	Cost or Basis
<b>EXAMPLE</b>		2009 Model T - (EXAMPLE ASSET)	03/09/09	25,750
	Comments:	22,500 job-related miles, 25,000 total miles		
1	Comments:			
2	Comments:			
3	Comments:			
4	Comments:			
5	Comments:			
6	Comments:			
7	Comments:			
8	Comments:			
9	Comments:			
10	Comments:			
11	Comments:			
12	Comments:			
13	Comments:			
14	Comments:			
15	Comments:			
16	Comments:			
17	Comments:			
18	Comments:			
19	Comments:			
20	Comments:			
21	Comments:			
22	Comments:			
23	Comments:			
24	Comments:			
25	Comments:			

## Alabama General Information

If you moved during the tax year, name of Alabama city moved to \_\_\_\_\_ [1] Zip code \_\_\_\_\_ [2]  
 If divorced during the tax year, enter former spouse's social security number \_\_\_\_\_ [3]  
 If you did not file a prior year Alabama tax return, enter reason: \_\_\_\_\_ [4]

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Contributions

**Enter the amount of contributions you wish to make:**  
**Political Contributions**

	Taxpayer	Spouse
Election campaign fund contribution (\$1.00) (1 = Democratic party fund, 2 = Republican party fund)	____ [5]	____ [6]

### Charitable Contributions

Neighbors Helping Neighbors	_____ [7]	Mental Health	_____ [16]
Senior Services Trust Fund	_____ [8]	Breast and Cervical Cancer Program	_____ [17]
Arts Development Fund	_____ [9]	4-H Club Foundation	_____ [18]
Nongame Wildlife Fund	_____ [10]	Organ Center Donor Awareness	_____ [19]
Child Abuse Trust Fund	_____ [11]	National Guard Foundation	_____ [20]
Veterans' Program	_____ [12]	Cancer Research Institute	_____ [21]
Indian Children's Scholarship Fund	_____ [13]	Alternative Fuels Fund	_____ [22]
Penny Trust Fund	_____ [14]	Military Support Foundation	_____ [23]
Foster Care Trust Fund	_____ [15]		

## Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Alabama**

Part-year residency dates:

From \_\_\_\_\_ [24]  
 To \_\_\_\_\_ [25]

If a nonresident of Alabama, enter state of legal residence \_\_\_\_\_ [26]

## Credits

Basic Skills Education Credit:

Dept of Education certification number \_\_\_\_\_ [27]  
 Name of sponsoring employer or firm \_\_\_\_\_ [28]  
 Name of approved provider \_\_\_\_\_ [29]  
 Location of provider \_\_\_\_\_ [30]  
 Total expenses \_\_\_\_\_ [31]

Rural Physician Credit:

Hospital where services provided \_\_\_\_\_ [32]  
 Community where services provided \_\_\_\_\_ [33]

**NOTES/QUESTIONS:**