

2009 Personal Income Tax Checklist

| | |
|----------------|-------------|
| Name: | DOB: |
| | SSN: |
| Spouse's Name: | DOB: |
| | SSN: |
| Street: | |
| City: | State: Zip: |

| Filing Status | Dependents |
|-------------------|------------|
| Single | Name DOB: |
| Married | SSN: |
| Head of Household | DOB: |
| Married Separate | SSN: |

Change of Address?

| | |
|--------------------|-------------|
| Phone Number: | Fax Number: |
| Cell Phone Number: | Email: |

| Income | |
|-----------------|----|
| W2's | \$ |
| 1099 | \$ |
| State Refund | \$ |
| Interest Earned | \$ |
| Dividends | \$ |
| Other Income | \$ |
| K1s | \$ |

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| |
|-----------------|
| Expenses |
|-----------------|

| | |
|---|----|
| A. Medical Expenses | |
| Prescriptions | \$ |
| Doctors/Hospitals (including homeopaths/chiropractors/dentists, etc.) | \$ |
| Eye Glasses or other medical devices | \$ |
| Health Insurance Premiums or co-pays | \$ |
| Mileage to/from visits to medical providers | \$ |
| Ambulances | \$ |

| | |
|--|----|
| B. Taxes | |
| Real Estate (primary home) | \$ |
| Real Estate (other) | \$ |
| Vehicle Registration(s) (cars, trucks, RVs, boats) | \$ |
| Taxes paid on personal property and sales taxes for major purchases such as furniture, recreational vehicles, boats, or planes | \$ |

| | |
|---------------------------|----|
| C. Interest | |
| Mortgage | \$ |
| Second Mortgage | \$ |
| Refinanced mortgage costs | \$ |
| Points paid | \$ |
| Second Homes | \$ |

| | |
|---|----|
| D. Charitable Contributions (Church, Scouts, Schools, Heart Association, United Way, etc.) | |
| Name | \$ |
| Name | \$ |
| Name | \$ |
| Name | \$ |

| | |
|--|----|
| E. Casualties and Theft (un-Reimbursed losses from disasters such as fires, hurricanes, tornados, etc.) | |
| Name | \$ |
| Name | \$ |

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Purchase of House (1st Time)

Address:

Date Purchased

Amount Paid

Closing Costs: List each line item:

Renovations:

Type of Renovation:

Amount:

New Vehicle Purchase:

Date Purchased

Amount Paid

Excise Tax

Sales Tax