2008 PERSONAL INCOME TAX RETURN DATA

The information required on this form is pertinent to the preparation of your INCOME TAX RETURN and relates to you and your family personally, and not to your business operations.

Please complete and return to us as soon as possible BUT NO LATER THAN FEBRUARY 16, 2009. **WE MUST HAVE THIS SIGNED DATA SHEET AND COMPLETED QUESTIONNAIRE TO PREPARE YOUR INCOME TAX RETURN.**

You are cautioned that paid bills and cancelled checks claimed by you as deductions herein, must be preserved for a period of at least three years to comply with federal and state tax regulations and audit procedures. Do not claim as deductions any bills that have not been paid during the year unless they were charged to your bank credit card before year end.

If we may be of assistance to you in preparing this form, kindly contact us.

		Social Security Number	Date of Birth	Date of Death
NAMES:	Self ______	______	______	______
	Spouse ______	______	______	______

OCCUPATION: Self ______________________ Spouse ______________________

ADDRESS: List your current mailing address below (↓). **Email address →** ______________________

____

Street City State Zip

______ ______ ______ ______ Do you live in city limits?

County Township/School District Home Phone Daytime Phone Yes ☐ No ☐

Your marital status as of 12-31-08 ☐ Single ☐ Married

		Yes	No		Yes	No
Do you want $3 to go to the presidential campaign fund? (This will not affect your tax.)	Self	☐	☐	Spouse	☐	☐
If you have a tax refund, do you want it directly deposited into your bank account? If yes, attach a deposit slip or voided check for the account in which you want the deposit made. Make sure the account meets the rules for direct deposit.		☐	☐			
Are you legally blind?	Self	☐	☐	Spouse	☐	☐

DEPENDENTS

Full Name	Date of birth	Social Security Number	Relationship	Months lived in home	Months as a student	% of Support By you	By others

A social security number must be provided. If your children do not live with you, please send a copy of the pre-1985 custodial agreement or Form 8332.

SALARIES & COMMISSIONS . . . SELF AND SPOUSE
Attach your **W-2 Forms** from your employer or **1099** Forms ☐ Number of W-2(s) attached.

Self (T) Spouse (S)	Employer	Federal Wages	Federal tax withheld	State tax withheld	Local tax withheld	State Wages	FICA Wages

ESTIMATED TAX PAYMENTS YOU HAVE MADE

	APRIL 15, 2008 1st QUARTER		JUNE 16, 2008 2nd QUARTER		SEPT. 15, 2008 3rd QUARTER		JAN. 15, 2009 4th QUARTER		
	Date	**Amount**	**Date**	**Amount**	**Date**	**Amounts**	**Date**	**Amount**	**TOTALS**
FEDERAL		$		$		$		$	$
STATE		$		$		$		$	$
LOCAL		$		$		$		$	$

INTEREST YOU EARNED (Do not include IRA interest)

☐ *Number of Forms 1099 INT and Brokerage Statements Attached*

TSJ	Check (√) if Tax Exempt	From Whom Received	Amount
			$

Interest income from seller financed mortgage ____________

List name and social security number of payer ____________

DIVIDENDS YOU EARNED

☐ *Number of Forms 1099 DIV and Brokerage Statements Attached*

TSJ	From Whom Received	Ordinary Dividend	Capital Gains	Qual-ified	Non-Taxable	Check (√) if Tax Exempt

CAPITAL GAINS AND LOSSES

Sales of real estate, personal property, stocks, bonds, etc.

ITEM SOLD Provide broker statements w/ 1099B / cost information	TSJ	DATE ACQ'D	DATE SOLD	SELLING PRICE	COST	GAIN (LOSS)

FOR REAL ESTATE, ENCLOSE SETTLEMENT SHEETS. FOR STOCK SALES, PROVIDE COST OF STOCK AND BROKERAGE STATEMENTS.

RENT AND ROYALTY INCOME

	Address #1	Address #2
Description and address of Property		
GROSS RENTS	$	$
EXPENSES		
Advertising		
Auto and travel		
(# of miles)		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and professional		
Mortgage interest (Attach 1098 if available.)		
Other interest		
Repairs		
Improvements *Complete schedule		
Supplies		
Taxes		
Utilities		
Other		
What percent of the property did you occupy during 2008?	________%	________%
If vacation home or condo, How may days occupied by You during 2008?	________	________
Number of days rented 2008	________	________
Were you active in the Management of the rental property in 2008?	Yes ☐ No ☐	Yes ☐ No ☐

*SCHEDULE OF IMPROVEMENTS TO RENTALS

Did you make improvements to investment or rental property or purchase furnishings for it?

Date	Description of Asset Purchased	Cost

OTHER INCOME

Did you receive an economic stimulus check in 2008? Yes ☐ No ☐

If yes, how much was the stimulus check for? $ ____________

Partnerships or LLC (Attach K-1) $ ____________

Did you materially participate in the partnership or LLC? Yes ☐ No ☐

S-Corporation (Attach K-1) $ ____________

Did you materially participate in the S-Corp? Yes ☐ No ☐

Estate or Trust (Attach K-1) $ ____________

State income tax refund $ ____________

Alimony $ ____________

Pension/profit sharing (Attach 1099R/RRB-1099R) Please include all 1099R's

IRA distributions (Attach 1099R) Please include all 1099R's

Unemployment compensation $________ $________

Social security/railroad retirement(Tier II) (Attach Forms SSA-1099/RRB-1099) $________ $________

OTHER INCOME CONTINUED NEXT PAGE

OTHER INCOME (CONTINUED)

* Lottery or other winnings............ $ ____________________
Tips (not included in W- 2) .... $ ____________________
Other ________________________ $ ____________________
* Gambling winnings $ ____________________

INSTALLMENT SALE INCOME:

Total received this year.................................... $ ____________________
Interest included above...................................... $ ____________________
Year of sale ____________________
If we did not prepare the return for year of sale, please provide Form 6252 for that year..

*** input all gambling losses on page 4.**

ROTH IRA CONVERSION (attach a copy of your 1099R)

1. Did you convert any traditional IRA into any ROTH IRA? Yes ☐ No ☐ If no, go to the next section. If yes, who converted how much?
   Self ________________________ Spouse ________________________
2. Did you or your spouse ever make a nondeductible IRA contribution? Yes ☐ No ☐ If yes, did we prepare your latest Form 8606?
   Yes No If no, please provide a copy of the most recent Form 8606 for you and your spouse.
   Also provide the end of year value of all traditional IRAs for yourself $ ____________________ and your spouse $ ____________________

ADJUSTMENTS TO INCOME

IRA, ROTH IRA, KEOGH, SEP, SIMPLE PAYMENTS

Please include statements from Plan Administrators and a copy of any 5498

	SELF	SPOUSE
Are you covered by an employer retirement plan?	**Yes** ☐ **No** ☐	**Yes** ☐ **No** ☐
PLAN TYPE		
____________________	$ ________________	$ ________________
____________________	$ ________________	$ ________________

Will nondeductible IRA contributions be withdrawn? **Yes** ☐ **No** ☐

OTHER ADJUSTMENTS

Educator expenses.................................. $ ________________
Reservist/Artist ... . $ ________________
Student loan interest paid (Attach 1098-E).............$ ________________
Tuition and fees deduction.......................... $ ________________
Archer MSA ....see Medical expenses below
Alimony paid ....$ ____________________ Last name and SSN of recipient:
____
Moving expenses (attach list) **....................................** $ ________________

BUSINESS USE OF PERSONAL VEHICLE (Use business questionnaire if appropriate)

Do not complete this part if you have already supplied your employer with your expenses and your reimbursement is not included in your wages.

	Vehicle #1	Vehicle #2
Description		
Date first used for business		
Lower of cost or value at date above		
Odometer reading at year end		
Total miles driven during the year		
• Commuting miles		
Business parking and tolls		
Interest paid (ignore for employee)		
Tax (PPT and value based registration)		

The vehicle was used for what business purpose? Employee ☐ Partner ☐
Other ____

Do you have evidence to support the business miles claimed? Yes ☐ No ☐
Is the evidence in writing? Yes ☐ No ☐

Cost of gas, oil, repairs, lease, etc. . . . Vehicle #1 $ ____________________
Vehicle #2 $ ________________________

Amount reimbursed by employer $ ____________________________________

MEDICAL EXPENSES **ITEMIZED DEDUCTIONS**

Med insurance premiums (no pretax employee payments) $ ___________
Long term care insurance ....Taxpayer $ ___________
....Spouse $ ___________
Prescription medicine and insulin.......................... $ ___________
Miles driven for medical care .... ___________mi.
Other medical transportation and lodging .... $ ___________
Dr. ____ $ ___________
Dr. ____ $ ___________
Dr. ____ $ ___________
Hearing aids .... $ ___________

Eye glasses/contacts .... $ ___________
Nurses .... $ ___________
Lab fees .... $ ___________
Ambulance .... $ ___________
Hospitals (list) ______________________________ $ ___________
____ $ ___________
Other (specify) ______________________________ $ ___________
Less Insurance reimbursement (___________)
Medical savings account (Attach 5498-MSA) $ ___________
For MSA → Individual or Family Coverage?

TAXES

Real estate tax (personal residence) .... $ ___________
Taxable value of home (not SEV).. $ ___________
State sales tax at general rate from receipts .... $ ___________
Special item sales tax i.e. car/boat .... $ ___________
Other real estate taxes (investment property) .... $ ___________
Personal property tax and value added tax on personal vehicles................................... $ ___________
Balance paid with prior year state and / or local return (tax only) .... $ ___________

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INTEREST PAID (Do not include rental property. Enter student loan interest in ADJUSTMENTS TO INCOME section.)

Home mortgage paid to financial institution $ ___________

Was any mortgage money used to buy a boat? Yes ☐ No ☐

Was any of the money used for any purpose other than to buy or build your main home and one other? Yes ☐ No ☐

If yes, how much? $ ___________

Home mortgage interest paid to an individual $ ___________

Provide name, address and SSN of payee:

(Attach all Forms 1098) # of 1098s attached_______

Closing points on new home purchase .... $ ___________

Closing points on current year refinance .... $ ___________

How much of the refinance money was used to add improvements to your home? $ ___________

Investment interest... $ ___________

Interest paid to invest in a partnership or S-Corporation that you manage ....… $ ___________

* Provide a copy of settlement papers.

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CONTRIBUTIONS

PAID TO	AMOUNT/VALUE	PAID TO	AMOUNT/VALUE
______________________ Church	$ ______________	_________________________	$ ______________
Easter seals ………………………….	$ ______________	_________________________	$ ______________
Salvation army ………………………	$ ______________	_________________________	$ ______________
Scouts ………………………………..	$ ______________	Miles driven for qualified charity	___________ mi.

Do you have receipts for all **cash** contributions **over $250**? Yes ☐ No ☐ For **noncash** contributions, provide cost, value and indicate how you determined the value of your donation. For each **noncash** donation valued at **$5,000** or more, do you have an **appraiser's verification**? Yes ☐ No ☐

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LOSSES

Did any sudden and unexpected event cause damage to any of your property this year? Yes ☐ No ☐

If yes, attach a sheet with a detailed list of items damaged for each separate event. Please include a description of each item, its cost and its value before and after the unexpected event.

Did you file an insurance claim? Yes ☐ No ☐ I have no insurance coverage ☐

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MISCELLANEOUS
(Paid personally)

Gambling losses (up to winnings only) $ ______________

Tax preparation $ ______________

Tools $ ______________

Adoption expenses $ ______________

- Check if foreign ☐
- Final date ______________

Job related educational expenses

- Books $ ______________
- Tuition $ ______________

Miles driven (work to school) ________________________

Safe deposit box $ ______________

Union and professional dues $ ______________

Professional publications $ ______________

Uniforms $ ______________

Unreimbursed employee expense $ ______________

(Attach list)

Investment expenses $ ______________

IRA maintenance fee $ ______________

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CHILD AND DEPENDENT CARE

IF YOU AND YOUR SPOUSE WORKED, OR ONE WAS A FULL TIME STUDENT, DID YOU HAVE CHILD CARE EXPENSES? YES ☐ NO ☐

Number of qualifying persons cared for in 2008_________ Expenses paid in 2008 for 2007: _______________________

Amount of employer provided child care $______________ For whom were the 2007 expenses paid? ________________

Name and Relationship of Qualifying Person(s): ____

Amount paid for each: ____

If payments were made to an individual and they totaled more than $1,500 for 2008:

Were services performed in your home? Yes ☐ No ☐ If yes, have you filed wage tax returns? Yes ☐ No ☐

If yes, attach a copy of the W-2(s) you issued.

This information is required for credit to be allowed

Name of each child care provider ____

EIN/SSN of each provider ____

Address of each child care provider ____

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OTHER

Did you pay someone more than $1,500 to work in your home in 2008? Yes ☐ No ☐ If yes, how much? _____________

Attach a copy of W-2(s) you issued.

Are there any loans to you or from you, that are in the amount of $12,000 or more, that are interest free?

Yes ☐ No ☐ If yes, what is the date of the loan? _________________ and the amount $ ___________________

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DECLARATION

I HAVE REVIEWED THE INFORMATION GIVEN YOU ON THIS FORM AND, TO THE BEST OF MY KNOWLEDGE, IT IS TRUE, CORRECT AND COMPLETE. I HAVE MAINTAINED THE UNDERLYING RECORDS REQUIRED BY LAW TO SUPPORT THIS INFORMATION AND IT IS READY FOR PREPARATION OF MY INCOME TAX RETURN. I AUTHORIZE YOU/YOUR COMPANY TO PREPARE MY INCOME TAX RETURN AND RETAIN COPIES OF APPROPRIATE DOCUMENTS.

NOTE: PLEASE DO NOT FORGET YOUR SIGNATURE

→

Signature ____

Date ____

Personal Information

	Yes	No
Did your marital status change during 2008? ……………………………………………………………….…………..		
If married, do you and your spouse want to file separate returns? ……………………………………………..….		
Did your address change during 2008? ………………………………………………………………………..……		
Can you or your spouse be claimed as a dependent by another taxpayer? ……………………………….……..…..…		

Dependents

	Yes	No
Did you receive any Earned Income Credit? ………………………………………………………………………. If yes how much?____________		
Did you pay for childcare while you worked or looked for work? ……………………………………………………		
Do you have any children under age 18 or a full-time student between the ages of 19 and 24 with unearned (investment income) more than $1,800?...……………………..………..…		
Did you adopt a child or begin adoption proceedings during 2008? ……………………………………………….		

Purchases, Sales and Debt

	Yes	No
Did you have any debts canceled, forgiven, or refinanced during 2008? ……………………………………………		
Did you start a new business, purchase a new rental property or farm, or acquire any new interest in any partnership or S Corporation during 2008? …………………………………………………………………………		
Did you sell an existing business, rental property, farm, or any existing interest in a partnership or S Corporation during 2008? ………………………………………………………………………………………………..…		
Did you sell, exchange, or purchase any real estate in 2008? If so, please attach closing statements. ………………		
Did you withdraw any amounts from your IRA or Roth IRA to acquire a principal residence? …………………..…		
Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan? …….………………………………………….		
Did you take out a home equity loan in 2008? If yes, provide closing statement. What were the funds used for?____ …….………………………………………		
Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the Form 1098? If yes, provide name, address and ID# of recipient ____________________________________		
Did you pay any student loan interest?		

Itemized Deductions

	Yes	No
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization? ……………………………………………………………………………………………………….		
Did you incur any casualty or theft losses during the year? ……………………………………………………….		

Miscellaneous

	Yes	No
Did you or your spouse contribute to or establish a medical savings account (MSA) in 2008 or a Health Savings Account (HSA)? …………………………………………………………………………………………………..		
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren? …………………………………………………………		
Did you or your spouse contribute to or establish a Roth IRA or convert an existing IRA into a Roth IRA?		
Did you withdraw any amounts from a Coverdell Education Savings Account (formerly educational IRA)?		
Did you or your dependents incur any post secondary education expenses, such as tuition? ……………………….. ***If yes, request and complete work paper 9015E***		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If yes, how many months were you covered		
Did you move to a different home because of a change in the location of your job? …………………………………		

Questions (continued)

Miscellaneous (continued)	Yes	No
Did you receive unreported tip income of $20 or more in any month of 2008? ……………………………………..		
Did you or your spouse receive distributions from long-term care insurance contracts? If yes, please include Form 1099-LTC …………………………………..……………………………………….		
Did you make gifts of more than $12,000 to any individual? …………………………………………………………		
Did you have any foreign income or pay any foreign taxes during 2008? ……………………….…………………....		
Were you or your spouse 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 create or transfer money or property to a foreign trust? …………………………………………………….		
Did you purchase a new "clean fuel" vehicle, electric vehicle or hybrid vehicle in 2008? If yes, what kind?		
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year? If undyed diesel fuel, provide the name and address of the supplier and the dates of purchase ………………..		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness? ….		
Did you engage in any bartering transactions? ………………………………………………………………………..		
Were you notified by the IRS or other taxing authority of any changes in prior year returns? ……………………….		
Do you owe your state any **use tax** for out of state purchases? If yes, provide the information required by your state. If you have questions about the requirements, ask your tax advisor. ……………………..………………….		
Are you or your spouse a teacher (K-12th grade) who spent up to $250 on classroom related expenses?…………..		
Did you or your spouse incur job related legal fees?…………………………………………………………………		
Sale of Your Home		
Did you sell your home in 2008? ………………………………………………………………………………………..		
If yes, did you (or your spouse if MFJ) own the home as your principal residence for at least two years of the five-year period prior to the sale? ………………………………………………………		
If yes, did you (**and** your spouse if MFJ) occupy the home as your principal residence for at least two years of the five-year period prior to the sale? ………………………………………………………		
Was the home acquired through a tax free (1031) exchange?…………………………………………………………		
Did you ever use any portion of the home for business purposes? ……………………………………………………		
Have you or your spouse sold a principal residence within the last two years? ………………………………………		
At the time of sale, was the residence owned by the taxpayer, spouse or both? ………………………………………	______________	
Severance/Retirement		
Did you retire or change jobs in 2008? …………………………………………….…………………………….		
Did you receive retirement/severance compensation? If yes, date received. ____________ ………………………..		
Did you or your spouse turn age 70 ½ during the year and have money in an IRA or other retirement account Without taking any distribution? If yes, why?		

Notes: