

# New Client Checklist - 2009

Name \_\_\_\_\_

\_\_\_\_\_ **COPY OF LAST TWO YEAR'S RETURNS**, including social security numbers and dates of birth for any dependents you support (not just children). We will review your recent tax returns at no charge, often we can amend and save you money.

\_\_\_\_\_ Estimated payments (both federal and state, including amounts and dates paid).

\_\_\_\_\_ W-2's and 1099-R's, social security, retirement income, unemployment compensation, HSA contributions/deductions, gambling income and losses.

\_\_\_\_\_ 1099's (interest, dividends, miscellaneous income, cancellation of debt, etc).

\_\_\_\_\_ **Property tax bill** (parcel number is now required on IL return), mortgage interest, office-in-home expenses, and closing statements from home sale/purchase.

\_\_\_\_\_ Sales of investments **including COST, proceeds, and dates of transactions** (anytime you receive a **1099-B**, you have a sale). Please ask the broker to provide this.

\_\_\_\_\_ All tuition and fees (including loans) from kindergarten to college, student loan interest.

\_\_\_\_\_ Totals for medical expenses, including **health insurance premiums** and long-term care premiums (total must exceed 7.5% of adjusted gross income to be deductible).

\_\_\_\_\_ Totals for charitable contributions, cash and non-cash, if itemizing deductions (bring non-cash receipts and value of the contribution for Amvets, Goodwill, etc.).

\_\_\_\_\_ Totals for child care expenses (includes pre-school). **SS # or EIN of provider required.**

\_\_\_\_\_ Unreimbursed employee business expenses (includes union dues, tools, supplies, safety gear, protective clothing, uniforms, and job-related educational expenses).

\_\_\_\_\_ Business miles and total miles on vehicle for the year, including odometer reading.

\_\_\_\_\_ Self-employment income, expenses, equipment placed in service (including dates).

\_\_\_\_\_ IRA, Roth, Section 529 Plans, or Illinois college plan contributions or distributions.

\_\_\_\_\_ Sales tax paid on any large purchases. Energy-saving improvements to your home.

\_\_\_\_\_ If you want **direct deposit** of your refund, please provide the following information with your tax package: name of bank, routing number, account number, and whether it is a checking or savings account (a copy of a check is preferred).

\_\_\_\_\_ Any other income, expenses, distributions, rollovers, or relevant items. It is a good idea to bring your check register from the prior year to the tax appointment to look up amounts.

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**GLINDA COMPANY, INC.**

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