

The Tax Appointment Worksheet is a tool to help you gather the needed information.

|    | EVENT  | DOCUMENTS OR INFORMATION NEEDED   |
|----|--|---|
| 1  | Married, divorced, or separated in 2009  | Married - prior year return of both spouses.<br>Divorced - copy of the divorce decree<br>Separated - copy of the separate maintenance agreement   |
| 2  | Birth or adoption  | Social Security cards and adoption papers   |
| 3  | Death of child or spouse   | Date of death   |
| 4  | Additional members of household  | Date of occupancy and relationship<br>Start date  |
| 5  | Job change   | Name of new employer<br>W-2s from new and old employers   |
| 6  | Unemployment   | Unemployment form   |
| 7  | Retirement contribution  | Type of plan-<br>Amount of contribution-  |
| 8  | Retirement distributions   | Form 1099-R   |
| 9  | Social Security benefits   | Form 1099-SSA   |
| 10 | Sale of stocks, bonds, etc.  | Form 1099-B or other sale documents; basis or original costs  |
| 11 | Purchase of stocks, bonds, etc., personal residence, or other real estate  | Purchase documents; closing papers  |
| 12 | Inheritance  | Will; K-1 from the estate   |
| 13 | Trade any property   | Date of trade, property given up and property received, or closing papers basis and FMV; qualified intermediary sales agreements  |
| 14 | Start or end a small business  | Formation or termination dates;<br>Property contributions or distributions  |
| 15 | Lawsuit settlements  | Date received; reason for the settlement; 1099-MISC   |
| 16 | Rental property  | Income; expenses; new property purchased  |
| 17 | Prizes   | Form 1099-MISC; value of prizes not included on Form 1099-MISC  |
| 18 | Lottery or gambling winnings   | Total amount won whether on W-2G or not; total amount of losses.  |
| 19 | Health insurance, medical, dental, or drug expenses<br><br>Medical miles (24 cents per mile)   | Health insurance premiums; post-taxed payments; totals of other medical, dental, and drug expenses. If the health insurance is pre-taxed (i.e., cafeteria plan, Sec. 125, POP), premiums have already been deducted from the wage.<br>Total miles driven- |
| 20 | State taxes income, property taxes paid, sales tax paid on vehicles, motorcycles, or homes   | Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return  |
| 21 | Purchase or refinance a home; first-time homebuyer prior to 4-20-10  | Closing papers from purchase; Forms 1098<br>HUD 1 - Signed  |
| 22 | Charitable contributions of money, property, or out-of-pocket expenses<br><br>Charitable miles (14 cents per mile)<br>Transfer of IRA to charity | Date and type of contributions, knowledge that receipts from the organizations have been received; mileage log for charitable work<br>Total miles driven-<br>Brokerage statement showing transfer   |
| 23 | Job-related expenses<br><br>Business miles (55 cents per mile)   | Meals, lodging, and miscellaneous expense amounts for items related to employment<br>Total miles driven, business miles driven per vehicle  |
| 24 | Educational or student loan interest expenses  | Form 1098-T for parents or children; interest record for student loans; if the child is a student, the form will come to the child  |
| 25 | Child or disabled spouse care  | The name, address, and 10 number of the day care provider; the amount paid to the provider; if the provider comes into your home, aW-2 may be required  |
| 26 | Energy credit  | Information regarding the purchase of qualifying vehicle, windows, doors, furnace, solar, or other energy upgrades.   |
| 27 | Bankruptcy filing  | Date filed-   |
| 28 | Debt forgiveness or abandonment of property  | Form 1099-A for abandonment<br>Form 1099-C for cancellation   |