



## **2009 Checklist for taxes**

**To ensure a complete tax return, all applicable items listed must be gathered. Not everyone is going to have all of what is included on the list, but you should have some of the items.**

### **Questions**

1. Is your address the same as the prior year?
2. Did your marital status change?
3. Can you be claimed as a dependent by another taxpayer?
4. Did you incur moving costs because of job change?
5. Did you start a new business in 2009? See bottom of page for deductible expenses.
6. Did you purchase rental property during 2009? If yes, need income and expenses incurred for property.
7. Did you make any estimated tax payments during 2009 or put any of your last years refund toward taxes?
8. Did you buy or build a house in 2009? If yes, I will need your closing statement.
9. Did you, your significant other, or a dependent become a full-time college student in 2009? You should have form 1098-T for qualifying tuition expenses.
10. Did you give birth/adopt a child in 2009? If yes, I will need their social security number, birth date, and if applicable, copies of all adoption expenses.
11. Please let me know of any unique situations that happened in tax year. (Ex. Selling inherited property, sell a business).
12. Were you a first time homebuyer in 2009 (eligible for \$8,000 first time homebuyer credit)?
13. Did you purchase a new vehicle for under \$45,000 in 2009? (if so I will need your invoice). Was it a hybrid (additional credit for this)?
14. If you are a new client, I will need the amount of your New York State refund for 2008. I will already have it if you are a current client.

## **Due Dates for Business Entities**

- **Sole Proprietor**- April 15th (Schedule C of Schedule 1040)
- **S-Corporation**- March 15th (\$100 fee every year for New York State)
- **LLC (both single member and partnership)**- April 15th, (\$500 fee every year), Single Member LLC's have a Schedule C like a sole proprietor

## **Sales Tax Return Due Dates**

March 20th, June 20th, September 20th, and December 20th (every year)

## **Required 1040 Items for 2009 Tax Preparation**

1. \_\_\_\_\_ Most Recent Tax return, if not done by me.
2. \_\_\_\_\_ Dependent(s) names, social security numbers, and birthdates
3. \_\_\_\_\_ All W2's received from your employer
4. \_\_\_\_\_ All 1099-Misc forms
5. \_\_\_\_\_ Student loan statements
6. \_\_\_\_\_ All 1099-Interest statements for bank interest
7. \_\_\_\_\_ All 1098's for mortgage interest have on house
8. \_\_\_\_\_ All 1099-G's for unemployment compensation
9. \_\_\_\_\_ Form from government for state tax refunds from previous year
10. \_\_\_\_\_ All year-end investment statements
11. \_\_\_\_\_ Fees for 2008 tax return
12. \_\_\_\_\_ All medical expenses (prescription & doctor copays, medical insurance premiums, payment for medical that comes out of paycheck) if think qualify for deduction.

13. \_\_\_\_\_ Real Estate Taxes for 2009 (School, County & Town, and Village (in some cases))
14. \_\_\_\_\_ Charitable contributions (both cash and items donated)
15. \_\_\_\_\_ Any unreimbursed business expenses (dry cleaning, union dues, cell phone, uniforms for work (uniforms do not include professional suits/blouses/pants/etc.), membership dues for professional groups, exam fees (ex. CPA exam), etc.)
16. \_\_\_\_\_ All childcare expenses (must have person/place address and ID #)
17. \_\_\_\_\_ Statements for New York State Qualified 529 Plan and amounts contributed
18. \_\_\_\_\_ All expenses paid for adopting a child in 2009.

**Schedule C / General income & expense items**

**Required for Business Tax Preparation(all may not apply)**

\_\_\_\_\_ Revenue earned in 2009

\_\_\_\_\_ Cost of goods sold

**Receipts for expenses**

\_\_\_\_\_ Advertising

\_\_\_\_\_ Bank Service Charges

\_\_\_\_\_ Insurances for business

\_\_\_\_\_ Membership dues

\_\_\_\_\_ Professional fees (both legal, accounting, etc.)

\_\_\_\_\_ All interest paid on bank loans for business

\_\_\_\_\_ Office Expenses (ink for printer, printer paper, pens, pencils, etc.)

- \_\_\_\_\_ Building and maintenance repairs
- \_\_\_\_\_ Meals and entertainment for business
- \_\_\_\_\_ Travel expenses (airfare, lodging, etc.)
- \_\_\_\_\_ Tolls & Parking
- \_\_\_\_\_ Utilities (timewarner, National Grid, telephone, cell phone)
- \_\_\_\_\_ Postage and delivery
- \_\_\_\_\_ Seminars
- \_\_\_\_\_ Supplies used exclusively for business
- \_\_\_\_\_ Credit card processing fees
- \_\_\_\_\_ Continuing education
- \_\_\_\_\_ All significant assets purchased in 2009 (office equipment, office furniture, filing cabinet, etc.)
- \_\_\_\_\_ Either mileage or car expenses (fuel, repairs, etc.) – NOT both
- \_\_\_\_\_ All payroll paid to employees/contractors
- \_\_\_\_\_ Health insurance premiums (if not under spouses insurance)
- \_\_\_\_\_ Rent
- \_\_\_\_\_ Home office expense (need to know % office square footage to total house or apartment square footage)- need home utility bills, internet, repairs and maintenance, homeowners insurance, etc.