General: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) ___

Mark if you were married but living apart all year ___

	Taxpayer	Spouse
Social security number	___	___
First name	___	___
Last name	___	___
Occupation	___	___
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)	___	___
Mark if legally blind	___	___
Mark if dependent of another taxpayer	___	___
Was taxpayer between 19 and 23 and full-time student? (1 = Yes, 2 = No)	___	
Mark if member of U.S. Armed Forces in 2008	___	___
Date of birth	___	___
Date of death	___	___
Work/daytime telephone number/ext number	___ ___	___ ___
Do you authorize us to discuss your return with the IRS (1 = Yes, 2 = No)	___	

General: 1040, Contact

Present Mailing Address

Address ___

Apartment number ___

City/State postal code/Zip code ___ ___ ___

Home/evening telephone number ___

Taxpayer email address ___

Spouse email address ___

General: 1040

Dependent Information

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months lived in your home	Care expenses paid for dependent

Credits: 2441

Child and Dependent Care Expenses

	Provider #1	Provider #2
Provider information:		
Name	___	___
Street address	___	___
City, state, and zip code	___	___
Social security number OR Employer identification number	___	___
Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP)	_	_
Amount paid to care provider in 2008	___	___

	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited	___	___

General: Info

Direct Deposit/Electronic Funds Withdrawal Information

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial institution routing transit number ___

Name of financial institution ___

Your account number ___ Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

*Refunds may only be deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Income: W2

Salary and Wages

Please provide all copies of Form W-2 that you receive.
Below is a list of the W-2's as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: 1099R

Pension, IRA, and Annuity Distributions

Please provide all copies of Form 1099-R that you receive.
Below is a list of the 1099-R's as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: K1, K1T

Schedule K-1s

Please provide all copies of Schedule K-1s that you receive.
Below is a list of the K-1s as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable

Income: W2G

Gambling Income

Please provide all copies of Form W-2G that you receive.
Below is a list of the W-2Gs as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Educate: 1099Q

Qualified Education Plan Distributions

Please provide all copies of Form 1099-Q that you receive.
Below is a list of the 1099-Q's as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: Income

Economic Stimulus Payment (Rebate)

Enter the amount of the stimulus payment (before offset) you received below. If you filed a joint return in 2007, and your filing status did not change in 2008, fill in only the Taxpayer/Joint column. However, if your filing status changed to married filing joint in 2008 and your spouse received a separate payment, enter the amount in the Spouse column.

	Taxpayer/Joint	Spouse
Economic stimulus payment (rebate) received in 2008		
Mark if you did not receive an economic stimulus payment (rebate)		

Income Summary

Below is a list of the forms as reported in last year's tax return. If a particular form no longer applies, mark the applicable box. Please provide all copies of the forms that you received.

Form	T/S/J	Description	Mark if no longer applicable

Income: B1

Interest Income

Please provide all copies of Form 1099-INT.

T/S/J	Payer Name	Interest Income	Prior Year Information

Income: B3

Seller Financed Mortgage Interest

T, S, J ___ Payer's name ____________________

Payer's address ____________________ Payer's social security number ____________

Amount received in 2008 ____________ Amount received in 2007 ____________

Income: B2

Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information

Income: D

Sales of Stocks, Securities, and Other Investment Property

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis

Income: Income

Other Income

Please provide copies of all supporting documentation.

	2008 Information		Prior Year Information
State and local income tax refunds			
	Taxpayer	**Spouse**	**Prior Year Information**
Alimony received			
Unemployment compensation			
Unemployment compensation repaid			
Social security benefits			
Medicare premiums to be reported on Schedule A			
Railroad retirement benefits			
Veterans' disability or death benefits			

Other Income:

T/S/J		2008 Information	Prior Year Information

1040 Adj: IRA

Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

	Taxpayer	Spouse
Traditional IRA Contributions for 2008 -		
If you want to contribute the maximum allowable traditional IRA contribution amount, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	___	___
Enter the total traditional IRA contributions made for use in 2008	________	________
Roth IRA Contributions for 2008 -		
Mark if you want to contribute the maximum Roth IRA contribution	___	___
Enter the total Roth IRA contributions made for use in 2008	________	________

Educate: Educate

Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2008 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2008 Information	Prior Year Information
___	________	________	________
___	________	________	________

Complete this section if you paid qualified education expenses for higher education costs in 2008.
Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.
Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
___	_	________	________	________	________	________
___	_	________	________	________	________	________
___	_	________	________	________	________	________
___	_	________	________	________	________	________

***Education Expense Code: 1 = Hope credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction**
The student qualifies for the Hope Credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 2 years of post-secondary education; has had no drug convictions in 2008 and has not claimed the Hope credit in more than one prior tax year.

1040 Adj: 3903

Job Related Moving Expenses

Complete this section if you moved to a new home because of a new principal work place.

Description of move	________
Taxpayer/Spouse/Joint (T, S, J)	___
Mark if the move was due to service in the armed forces	_
Number of miles from old home to new workplace	________
Number of miles from old home to old workplace	________
Mark if move is outside United States or its possessions	_
Transportation and storage expenses	________
Travel and lodging (not including meals)	________
Total amount reimbursed for moving expenses	________

1040 Adj: OtherAdj

Other Adjustments to Income

Alimony Paid:

T/S	Recipient name	Recipient SSN	2008 Information	Prior Year Information
___	________	________	________	________

Address ________ **City** ________ **State** ___ **Zip code** ________

	Taxpayer	Spouse	Prior Year Information
Educator expenses:			
________	________	________	________
________	________	________	________
Other adjustments:			
________	________	________	________
________	________	________	________
________	________	________	________

Itemized: A1

Medical and Dental Expenses

T/S/J		2008 Information	Prior Year Information
__	Medical and dental expenses	________	________
__	Medical insurance premiums you paid	________	________
__	Long-term care premiums you paid	________	________
__	Prescription medicines and drugs	________	________
__	Miles driven for medical items 1/1/08 through 6/30/08 ________	7/1/08 through 12/31/08 ________	________

Itemized: A1

Tax Expenses

T/S/J		2008 Information	Prior Year Information
__	State/local income taxes paid	________	________
__	2007 state and local income taxes paid in 2008	________	________
__	Sales tax paid on actual expenses	________	________
__	Real estate taxes paid	________	________
__	Personal property taxes	________	________
__	Other taxes	________	________

Itemized: A2

Interest Expenses

T/S/J		2008 Information	Prior Year Information
__	Home mortgage interest: From Form 1098	________	________

Other, such as: Home mortgage interest paid to individuals

T/S/J	Name	SSN	2008 Information	Prior Year Information
__	________	________	________	________

Address ________ ________

T/S/J		2008 Information	Prior Year Information
__	Investment interest expense, other than on K-1s:	________	________

Refinancing Information:	Refinance #1	Refinance #2
T/S/J	__	__
Description	________	________
Total points paid	________	________
Date of refinance	________	________
Total number of payments	____	____
Reported on Form 1098 in 2008	____	____

Itemized: A3

Charitable Contributions

T/S/J		2008 Information	Prior Year Information
__	Contributions made by cash or check	________	________
__	Volunteer miles driven	________	________
__	Noncash items, such as: Goodwill, Salvation Army	________	________

Itemized: A3

Miscellaneous Deductions

T/S/J		2008 Information	Prior Year Information
__	Unreimbursed expenses	________	________
__	Union dues	________	________
__	Tax preparation fees	________	________
	Other expenses, subject to 2% AGI limitation:		
__	________	________	________
__	________	________	________
__	Safe deposit box rental	________	________
__	Investment expenses, other than on K1s:	________	________
	Other expenses, not subject to the 2% AGI limitation:		
__	________	________	________
__	________	________	________
__	Gambling losses: (Enter only if you have gambling income)	________	________

Depreciation - Asset List

Preparer use only

Activity name ______________________________

HOW TO REPORT DISPOSALS: Use the blank line directly below the asset information to indicate any asset disposals. Enter the date of the disposal and/or sale proceeds, if applicable. Enter additional information regarding the asset disposal in the comments section, such as if the asset was sold on installment, traded for other asset(s), disposed of due to casualty, or sold to a related party. See the EXAMPLE asset below.

Asset No.	Description of Property	Date in Service	Cost or Basis
	Comments	Date Sold/Disposed	Sales Price
EXAMPLE	Machinery and equipment (EXAMPLE ASSET)	11/21/02	42,500
	Collected in 5 equal payments over 2 yrs	03/09/08	20,000

Depreciation - Asset Acquisitions

Preparer use only

Activity name

Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.

	Description of Asset Acquired	Date Acquired	Cost or Basis
EXAMPLE	2008 Model T - (EXAMPLE ASSET)	03/09/08	25,750
	Comments: 22,500 job-related miles, 25,000 total miles		
1			
	Comments:		
2			
	Comments:		
3			
	Comments:		
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