

**Tax Preparation Check List**  
**Tax Year 2009**

You must have all applicable forms with you in  
order to have your taxes completed.

- 1. Completed Tax Forms for 2008**
- 2. Valid Picture ID & Social Security Card**
- 3. 2009 Income Information:** W-2's & 1099's (all copies)  
Includes: Social Security, SSI, Interest, Dividends, Pensions, IRA's, lottery winnings, rental income, etc. *Bring information on both taxable & tax free income, Federal & State.*
- 4. 2009 Property Tax bills:** Summer & Winter *(even if the bill was paid in 2008...only for home owners & condo owners.)*
- 5. 2009 Rent Payments:** (including mobile homes) *Bring monthly rent amounts for 2008 including the Landlord's name & address. If living in subsidized housing, a statement from the landlord is needed about the percent of rent that is applied towards property taxes.*
- 6. Health & Prescription Insurance Premiums paid in 2009** - including Medicare, Part D, Advantage Plans, supplemental plans, etc.
- 7. Heating Credit Information:** Heating costs from Nov. 1, 2008 through October 31, 2009. *This information is available on-line or from your gas company or heat provider.*
- 8. Sale of Homes, Stocks, Bonds, Securities, Mutual Funds (1099B's):** *Bring information on the original cost(s) of these items and the dates purchased & sold.*
- 9. Checking/Savings Account Number & Routing Number:** *for direct deposit of any refunds.*