

CHRISTIAN ACCOUNTANTS

2009 TAX ITEMS

1. 2009 W-2 forms.
2. 2009 1099 forms (interest, pension, social security, etc).
3. Tax forms received from the **city** and **local** governments.
4. Social security cards for all **new** dependents.
5. Amount of any I.R.A. contributions.
6. Mortgage Interest statements.
7. Real estate taxes paid.
8. Charitable contributions.
9. Union dues paid (**also the name of the union**).
Uniforms and other work related expenses.
10. Child care expenses.
 - ▬ Name and address of provider.
 - ▬ Social security number of provider (If an individual).
 - ▬ Tax ID number of provider (if an organization).
 - ▬ Total amount paid to each provider.
11. Settlement sheets relating to sale or purchase of a home in 2009.
12. Amount of medical expenses paid.
13. Amount of college tuition paid either directly or by loans. (Form 1098-T)
14. Amount paid for college books and educational equipment needed for undergraduate study.
15. Amount of interest paid on college loans. (Form 1098-E)
16. Amount of sales tax paid on the purchase or lease of a motor vehicle in 2009.
17. If you are a school teacher, bring the amount paid for classroom supplies.
18. Cost of home improvements made which qualify for the residential energy credits.
19. If you desire direct deposit of your tax refund, bring the account number and routing number of your bank account. (**Refund can be split and sent to 3 different bank accounts**).

Note: If you operated a business or were a landlord in 2009, please call (215) 247-0340 or visit www.christianaccountants.com to obtain additional worksheets.