

**2010 TAX DATA SHEET**

	TAXPAYER (HUSBAND)	TAXPAYER (WIFE)
NAME		
SOC. SEC. #		
OCCUPATION		
DATE OF BIRTH		
HOME ADDRESS		CITY, ST, ZIP
TELEPHONE #	HOME (    )       -	BUSINESS (    )       -
	CELL (    )       -	SCHOOL DISTRICT
EMAIL ADDRESS		

**CHILDREN AND / OR DEPENDENTS**

NAME	SOC. SEC. #	RELATIONSHIP	BIRTH DATE	MTHS AT HOME

**BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND**

*Providing this information will significantly decrease the time required to receive your refund!*

Bank Name _____	Account Type _____	Checking	Savings
Routing Number _____	Account Number _____		

**BRING THIS TAX INFORMATION WITH YOU**

- Form W-2 statement from your employer and/or W-2p for pensions (last check stub if no taxes are withheld on pension).
- Bank or Savings & Loan interest income statements (1099 INT) (including checking & tax exempts, U.S. Bond and Treasury Bill interest).
- Dividend statements (1099 DIV) and brokerage year-end statements.
- All home real estate tax bills for 2010 – paid or not (we will need the 2010 assessed taxes and taxable value). We must have tax bills to prepare the Michigan Property Tax Credit.
- Social Security received for 2010 (bring SSA-1099 Form)  
 Husband     \$ \_\_\_\_\_     Wife     \$ \_\_\_\_\_     Children     \$ \_\_\_\_\_
- Tax-exempt interest income (bring statements or 1099).
- Furnish detail (Forms 1098 & 1099) for miscellaneous income such as directors fee, commissions, alimony, prizes, state & local tax refunds, etc. as well as brokers' statements.
- Do you plan on making a Regular or Roth IRA contribution prior to April 15, 2011?
- Tuition information from your school for educational credit(s). Please include 1099T if applicable.
- If this is your first year with us, bring a copy of your tax returns for 2008 & 2009.***

**2010 ESTIMATED TAX PAYMENTS PAID (TAXPAYER MUST COMPLETE, IF APPLICABLE)**

	FEDERAL ESTIMATES		STATE ESTIMATES		CITY ESTIMATES	
	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE
4/15/10						
6/15/10						
9/15/10						
1/18/11						

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## 2010 Tax Changes:

- No phase out of itemized deductions or personal exemptions.
- For tax years 2008, 2009 & 2010, the 5% maximum tax rate on qualified dividends and net capital gain (the excess of net long-term capital gain over net short-term capital loss) is reduced to 0% for taxpayers in the 15% tax bracket or lower. The 15% maximum tax rate on qualified dividends and net capital gain has not changed.
- If you do not file your return by the due date (including ext.) you may have to pay a failure-to-file penalty. For income tax returns required to be filed after 2008, the failure-to-file penalty for returns filed more than 60 days after the due date (including ext.) is increased. In this situation, the minimum penalty is the smaller of \$135 or 100% of the unpaid tax.
- Making work pay credit. You may be able to take this credit if you have earned income from work. Even if your federal income tax withholding is reduced during 2010 because of the credit, you must claim the credit on your return to benefit.
- The American Opportunity Credit (an expansion of the Hope Credit) is available for 2009 and 2010.
- In 2010 the first \$2,400 of unemployment benefits received is ***no longer*** tax-free. Also, buyers of new vehicles ***no longer*** get a tax benefit for sales tax paid unless they itemize & elect to deduct sales taxes instead of state & local income taxes.
- The property tax deduction for non-itemizers has ***NOT*** been extended. Taxpayers will not be able to deduct property taxes unless they itemize in 2010.

## Schedule A Itemized Deduction Worksheet:

~The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing jointly (\$11,400), married filing separately and single filers (\$5,700), and head of household (\$8,400).

~Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. DO NOT CLAIM as deductions any bills that have not actually been paid within the calendar year of 2010.

MEDICAL	AMOUNT	CONTRIBUTIONS	AMOUNT	MISCELLANEOUS	AMOUNT
Dentist		CASH OR CHECKS *		Alimony	
Doctors		Church		Paid to	
		College / University		Soc. Sec. #	
Hospital		Public Radio /TV		Amount	
Ins. Reimbursement		Other		Child Care Expenses	
Lodging Expenses				Paid to	
Long Term Care Prem.		PROPERTY (NON CASH) *		Soc. Sec. #	
Medicare Prem.		Charitable Mileage		Amount	
Med. Ins. Prem.		Goodwill Industries		Education Expenses	
Miles Driven		Salvation Army		Gambling Losses	
Prescription Drugs		Other		Investment Expenses	
Other		*Special form required for non-cash contributions that exceed \$500. All Contributions must have both statements and canceled checks to qualify as an itemized deduction.		License Fee	
INTEREST EXPENSE	AMOUNT			Professional Subscriptions	
Home Equity Loan				Safe Deposit Box	
Home Mortgage		TAXES	AMOUNT	Safety Equip., small tools	
Investment Interest		WE MUST HAVE COPIES OF ALL BILLS.		Tax Preparation Fee	
Land Contracts		Cottage		Teacher/Educator exp.	
Mortgage Int. Rate		Home		Telephone (business use)	
Mortgage Debt at 12/31		Land		Uniforms/Maintenance	
Refinance/Points Pd.		License Plates		Union/Professional Fees	
		Major Purchases, Sales Tax		Other	

## ADDITIONAL INFORMATION WE MAY NEED

- 2010 Energy Credit (non-refundable) – Home Improvements? \*Windows, Insulation, Doors, Roofs & Heating/Cooling Products (Provide Backup for Purchases), Solar or Wind energy products.
- Business use of automobile / Business Mileage Expense – we will need mileage breakdown per vehicle
- Furnish detail of income and expenses for**
  - Sale of Property
    - Form 1099-B
    - For stock sale, brokers buy and sell slips
    - For home sale or land sale, closing statements for home sold and for new home purchased and/or refinancing of current mortgage loan
- For Michigan Home Heating Credit, (for persons with limited income), total heating cost for 2010 \$\_\_\_\_\_ (from November 2009 through October 2010).
- IRA Year End statements (for review of Roth IRA Option).
- Michigan Use Tax Purchases . . . \$\_\_\_\_\_

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