Weinhold, Nickel & Company, LLP

CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS

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2009 INFORMATION CHECKLIST

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else.

____ Completed Client Questionnaire

____ All return packets or mailing labels sent to you by the various taxing agencies

____ All W-2's

____ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

____ All income information for children if you want us to prepare their required returns

____ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid

____ Total of all receipted charitable contributions, and details for any non-cash contributions over $500

____ Copies of all LLC, Partnership or S-Corporation K-l's (send separately later if everything else is ready, and let us know it's coming)

____ If you bought, sold or refinanced real estate, then a closing statement for each transaction

____ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale date (year-end summary statements are ideal)

____ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year

____ If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

____ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

____ All legal documents for formation, sale or purchase of a business during the year

____ All legal documents for divorce decrees

____ Voided check for account where refunds should be direct deposited (optional)

____ **New clients:** copies of prior federal, state and local returns and depreciation schedules, if applicable (at least one year, preferably three)

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1040 INDIVIDUAL TAX QUESTIONNAIRE FOR 2009

Name: ______________________________

Please check the appropriate answer and include all necessary details. We are fishing for write-offs, so be complete!

Personal Information	**Yes**	**No**
Did your marital status change during the year? If yes, explain: ______________________	___	___
Did your residence change during the year? ______________	___	___
Can you be claimed as a dependent by another taxpayer?	___	___
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or any other taxing authority during the year?	___	___
Dependent Information		
Were there any changes in dependents from the prior year? If yes, explain: ______________________	___	___
Do you have any children under age 19 or college students under age 24 with unearned income in excess of $1,900?	___	___
Did you pay any student loan interest this year?	___	___
Did you contribute to an Education Savings Account this year?	___	___
Did you maintain a home for someone not claimed as a dependent?	___	___
Did you pay for child care (babysitting, daycare) while you worked or looked for work?	___	___
If yes, please provide provider name, address and social security number/EIN and amount paid.		
Purchases, Sales and Debt Information		
Did you start or dispose of a business during the year?	___	___
Did you acquire a new or additional interest in an LLC, partnership or S corporation?	___	___
Did you sell, exchange, or purchase any real estate during the year? (send closing statement)	___	___
Did you dispose of any stock during the year? (send original cost and sale price and dates)	___	___
Did you have any debts cancelled or forgiven this year?	___	___
If yes, did you receive a 1099-C for a cancellation of debt?	___	___
Did you take out a home equity loan or line of credit this year or refinance any property? (send closing statement)	___	___
Did you purchase a hybrid (gas/electric) auto? If yes, list make, model and year.	___	___
Income Information		
Did you have any foreign income or pay any foreign taxes?	___	___
Did you at any time during the year have an interest in or signature authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	___	___
Did you receive any income from rental of property?		
Did you receive any income from property sold prior to this year?	___	___
Did you receive any lump-sum payments from a pension or profit sharing plan or 401(k) plan?	___	___
Did you make any rollovers or withdrawals from any retirement account?	___	___
Did you receive any disability or unemployment income?	___	___
Did you cash in any U.S. Savings bonds?	___	___
Did your college student receive educational benefits?	___	___
Did you receive a 1099-Q for a distribution from a 529 plan? If yes, attach form.	___	___
Did you receive a damage award for personal injury, sickness or discrimination?	___	___
Did you receive executor fees or jury duty fees? If yes, amount $ ___________	___	___
Did you receive or pay alimony (not child support)? If yes, amount $ ___________	___	___

Deduction Information	**Yes**	**No**
Did you incur an unreimbursed casualty or theft loss greater than 10% of your income?	___	___
Do you qualify for any Social Security benefits such as retirement, death, disability or Medicare? (send statement)	___	___
Do you have a donee acknowledgment to substantiate cash or check charitable contributions of $250 or more and proof of **all** charitable contributions?	___	___
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	___	___
Did you have any unreimbursed employee expenses or receive an allowance during the year?	___	___
Did you use your car on the job, for other than commuting?	___	___
Did you work out of town during the year?	___	___
Did you have educational expenses for you or your dependent(s)?	___	___
Did you have major medical expenses or medical insurance premiums?	___	___
Did you have any moving or job-seeking expenses?	___	___
Are you a teacher or school administrator who provided school supplies in your job?	___	___
Do you own or invest in a business that would be considered manufacturing?	___	___
Did you pay real estate taxes? If yes, amount $______________	___	___
Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle, or plane purchased for personal use? If yes, amount $ __________________	___	___
Do you have a Health Savings Account (HSA) or a Medical Savings Account (MSA)? If yes, provide the deductible $ ______________ contributions $ __________________ qualified withdrawals $ __________ and if single ____ or married ____ coverage	___	___
If you worked for yourself, did you pay health insurance premiums for yourself and your family? If yes, amount $ _______________	___	___
Credit Information		
Have you started any adoption process?	___	___
Did you start a new pension plan this year?	___	___
Did you make energy efficient improvements to your home in 2009?	___	___
Miscellaneous Information		
Are you in the military?	___	___
Did you make 2009 gifts of more than $13,000 to any individual?	___	___
Did you engage in any bartering transactions?	___	___
Did you pay any COBRA health care coverage continuation premiums?	___	___
Are you covered by a pension plan?	___	___
Did you make any Roth or traditional IRA contribution?	___	___
Have you ever made a non-deductible IRA contribution?	___	___
Do you have extra cash to contribute more into retirement?	___	___
Do you have stock options?	___	___
Did you receive correspondence from federal, state, or local tax authorities? If yes, explain: ____	___	___
Do you want to allocate $3 to the Presidential Election Campaign Fund?	___	___
Do you have a household employee?	___	___
Would you like to have your refund direct deposited (send voided check for account info)	___	___
Do you expect significant changes in income, expenses or dependents for 2010? If yes, explain: ____	___	___
Do you have a current will and power of attorney for health care and financial decisions? Approximate date: ______________________________	___	___
Did you live in the Katrina or Wilma Hurricane disaster area?	___	___
State Information		
Did you contribute to a 529 Plan? If yes, what state plan? _______________; amount $ ______________	___	___

____
Signature