

MDW Tax & Financial Services  
2009 Income Tax Guide

**Family Information:**

Name	DOB	SSN	Occupation

**Child Care:**

**2009**

Provider	Address

  

SSN or Fed ID#	Amount paid

**Investments/Property Sold:**

**2009**

(Need dates of purchase & sale, cost information and sales proceeds)

**Income:**

**2009**

Wages (W-2s)	_____
	_____
Dividends (1099-Div)	_____
	_____
Interest (1099-Int)	_____
	_____
Pension/Soc Sec (1099-R)	_____
	_____
Commissions/Bonuses	_____
State Inc Tax Refunds (1099-G)	_____
Unemployment	_____
Alimony	_____
Gambling Winnings	_____
K-1 Income	_____
Prizes/Commissions	_____
Other Income	_____

**Education Credits:**

**2009**

Tuition paid (1098-T)	_____
	_____
Interest paid on student loans (1098-E)	_____
	_____

**Estimated Taxes:**

**2009**

Dates/Amounts paid to Fed & State

15-Apr Fed	_____
State	_____
15-Jun Fed	_____
State	_____
15-Sep Fed	_____
State	_____
15-Jan Fed	_____
State	_____

**Itemized Deductions:**

**2009**

Medical/Dental (total costs need to exceed 7 1/2% adjusted gross income)

Prescription Drugs	_____
Medical Ins Prem	_____
Medicare B Prem	_____
Long Term Care Ins	_____
Doctors/Dentists Fees	_____
Hospitals/Clinics/Labs	_____
Eye Care/Glasses	_____
Med Equip/Supplies	_____
Nursing Care	_____
Medical Therapy	_____
Chiropractor Fees	_____
Mileage	_____
Other	_____

Taxes Paid

Real Estate	_____
Personal Property	_____
State/Local	_____

Interest Expense

Mortgage Int. to Bank	_____
Mortgage Int. to Individual	_____
Equity loan int. (up to Fair Mkt Value)	_____

Charitable Contributions

Church	_____
United Way	_____
Salvation Army	_____
Other charities:	_____
	_____

Non-Cash (Clothes, etc.)

Mileage	_____
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Employment & Investment Expenses- **NOT for self-employment, Call me for a business worksheet**

(total costs need to exceed 2% of adjusted gross income)

Union dues, Prof fees	_____
Books, Subscriptions	_____
Supplies & Tools	_____
Classroom Expenses	_____
Licenses & Fees	_____
Work/Safety Equip	_____
Uniforms & Cleaning	_____
Sales Expenses, Gifts	_____
Tuition & Books	_____
Meals & Entertainment	_____
Travel Expenses	_____
Lodging/Meals	_____
Airfare, Taxi, Car Rental	_____
Tax Prep fee	_____
Safety Deposit box	_____
Investment expenses	_____
Reimbursements received for above	_____

Casualty/Theft Losses

Other Information

- Hybrid car purchase
- Energy improvements to home
- Sales tax on motor vehicles