



## Tax Checklist for Personal Returns

**Instructions:** This is a list to help you pull together your tax information. Not everything will apply to you. Likewise, it is not all-inclusive. If you are not sure whether or not we need something, please include it. If you prefer to have the organizer from the tax software that shows your numbers from last year, please let us know. We will gladly email or mail you one right away.

Please note:

- (1) **NEW TAX LAW:** There was a lot of new tax law in 2009. Please see our 2009 year end newsletter for some of highlights.
- (2) **EXTENSIONS:** If we prepared your return last year, we will automatically extend your return this year (if needed) at no charge. That's true for the federal and state return(s) we prepared. But, if you need to file any new returns this year, we may not know that. So, please let us know if we need to file an additional state return so we can extend it on time.

Individual returns are due April 15 and can be extended to October 15. *Please get us all your information by March 15 in order for us to complete the return by April 15.*

- (3) **PAYMENT OF OUR FEES:** Payment in full is required when you pick up your taxes (or before we mail them to you).
- (4) **COMMUNICATION:** We rely on email a lot. If you don't get a response to your email in a day or two, please call the office. Our spam software can be a bit too aggressive.
- (4) **NEW CLIENTS:** Please include your prior year tax return as well as the dates of birth for everyone on the return.

Phone: 410-573-9991  
Fax: 410-573-9992

[marla@thehardinggroup.biz](mailto:marla@thehardinggroup.biz)

Name \_\_\_\_\_

Email address \_\_\_\_\_

Best phone number(s) \_\_\_\_\_

New address? \_\_\_\_\_

Marital status as of 12/31 \_\_\_\_\_

Name and ssn of new dependents (Congratulations!!)

\_\_\_\_\_

Is there anyone who no longer qualifies as a dependent? (Not sure? – please call us) \_\_\_\_\_

Multi-state return? List all states to be filed \_\_\_\_\_

Maryland Personal Property Return required? (Yes or No) \_\_\_\_\_

Who may we thank for referring you to us? \_\_\_\_\_

Questions/comments or anything else you want us to know:

## Things to include

- \_\_\_ W-2s, 1099s - all types: interest, dividends, miscellaneous, retirement, SSA, debt forgiveness
- \_\_\_ W-2s and/or investment income for the kids
- \_\_\_ Federal & state estimated tax payments, w/ the date and amount of each payment
- \_\_\_ State income tax refunds
- \_\_\_ Alimony paid or received
- \_\_\_ If you sold any stock: purchase date and cost for each
- \_\_\_ K-1s from partnerships or S corps
- \_\_\_ IRA or SEP contributions
- \_\_\_ Mortgage interest statements (for all loans, all properties)
- \_\_\_ Property taxes paid for all properties
- \_\_\_ Medical expenses (especially health insurance premiums for sole proprietors) and medical mileage
- \_\_\_ Charitable contributions- including the fair market value of "stuff" donated and charitable mileage
- \_\_\_ Unreimbursed employee expenses including mileage
- \_\_\_ All college education expenses, include 1098-T and 1098-E forms. *Credits available – see newsletter*
- \_\_\_ Contributions to section 529 college savings plans - include statements
- \_\_\_ Child care expenses with \$ amount per child and \$ amount, address and ssn for each caregiver.
- \_\_\_ Income, expenses and improvements for rental properties

- \_\_\_ If you bought or sold any real estate please include the HUD-1 closing statement. *Credit available – see newsletter*
- \_\_\_ Moving expenses and date of move if you moved more than 50 miles for a new job or business
- \_\_\_ Bank account information to have your refund direct deposited (if we don't have it from last year)
- \_\_\_ Cost and description of energy improvements to your home (windows, doors, insulation, heating systems)  
*Credits available – see newsletter*
- \_\_\_ If you purchased a new vehicle in 2009 please include the purchase paperwork. *Credits available – see newsletter*
- \_\_\_ Divorce paperwork if you were divorced this year
- \_\_\_ Information on foreign bank accounts, including online gambling accounts, and/or foreign income
- \_\_\_ Copy of prior year tax returns for new clients