

**Joseph C. Bissonnette & Co., LLC**

Certified Public Accountants

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**NEW CLIENT DROP-OFF WORKSHEET – Tax Year 2009**

Today's date \_\_\_\_\_

Taxpayer: \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_/\_\_\_/\_\_\_

Spouse: \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_/\_\_\_/\_\_\_

Home # \_\_\_\_\_ cell # \_\_\_\_\_

Email: \_\_\_\_\_ fax # \_\_\_\_\_

Address: \_\_\_\_\_

**List dependents** (if over 18, please indicate if full-time student or disabled)

Name	SS#	Birthdate
_____	_____	___/___/___
_____	_____	___/___/___
_____	_____	___/___/___
_____	_____	___/___/___

Any **dependent care expenses**? List name & TIN of daycare provider & amount paid per child. \_\_\_\_\_

Did any dependents receive more than **\$800** in income? Y / N

We are required to **electronically file** your tax return (except if claiming homebuyer credit, then you can't e-file). If you do **not** want to E-file, please see the receptionist for an **opt-out form** to sign.

If you would like your refund **directly deposited**, please attach a copy of a **voided check**.

If you would like a **paper check** for your refund/taxes owed, check here: [    ]

**\*\*\*Did you remember to bring a copy of last year's return?\*\*\***

***Incomplete information can delay processing.***

***If you have forgotten to bring any of the information above, please note below:***

Comments & special notations:

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There are a number of **NEW OR EXPANDED TAX CREDITS** available this year. Please be sure to tell us if you purchased a new home, a new car, motorcycle, or motor home, energy efficient heating/air conditioning, furnace, hot water heater, windows, skylights, doors, insulation, solar, geothermal, wind, fuel cells, or a hybrid or electric vehicle.

**DID YOU REMEMBER TO GIVE US:** Donations? (by ck or with receipts only) Car Taxes? Purchase price and date (cost basis) for any stock sales? Closing documents for any real estate purchases or sales? Unreimbursed business mileage? Any estimated tax payments made? Daycare expenses? Tuition expenses? IRA contributions?

\*\*\*\*\*Please give us **ALL** the tax forms you have received in the mail.\*\*\*\*\*

**PLEASE NOTE:** We will prepare your 2009 federal and state income tax returns from the information that you furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns when they are completed and, therefore, you should review them carefully.

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Taxpayer Signature

⇒ **All** personal income tax returns are **due and payable upon pick-up** unless otherwise arranged with us. We accept MasterCard, Visa, checks or cash.