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CLIENT DROP OFF WORKSHEET – Tax Year 2009

Today's date: _____

Name: _____

Address: _____

Home # _____ cell # _____

Email: _____ fax # _____

TELL US ABOUT ANY CHANGES TO YOUR FILING STATUS, DEPENDENTS, ETC.:

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.*****

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

Would like your refund (if any) **directly deposited**? Y / N If Yes, please attach a copy of a voided check, or if it's the same account you used last year, check here []

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 before signing them.

Taxpayer Signature

Remember, incomplete information can delay processing!

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