TEAMTAX®

Professional Tax Preparation Services

Saving You Time, Hassle and Money!

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INCOME ITEMS

Check list of things to bring

____ Wages (Include All W-2s)
____ Interest (Banks, Escrow, Other)
____ Dividends (Portfolio Statements from Investment Accounts)
____ State Income Tax Refunds
____ Social Security Income
____Pensions (1099R)
____ Alimony Received
____ K-1s (Investments, Trusts, Partnerships, S Corporations)
____ Stock Transactions (Buy & Sell Info. Cost Basis)
____ Other Income (Gambling, Jury Duty, **Debt Forgiveness 1099C**)
____ Business Income and Expenses Summarized ***(SEE US OR OUR WEB SITE FOR A DETAILED LIST)***
____ Rental Income and Expenses Summarized ***(SEE US OR OUR WEB SITE FOR A DETAILED LIST)***

ADJUSTMENTS TO INCOME

____ Moving Expenses
____ Alimony Paid (Need Ex-Spouse's name and SS#)
____ Health Insurance Premiums Paid for **Self-Employed**
____ Teacher Expenses
____ IRA Contributions
____Un-reimbursed overnight transportation, meals, and lodging expenses of National Guard and
____Reserve Members who must travel away from home more than 100 miles & stay overnight

____I claimed the 2008 Homebuyer credit of up to $7,500

ITEMIZED DEDUCTIONS

____ Medical Expenses: **MUST BE GREATER THAN 7.5% OF YOUR ADJUSTED GROSS INCOME**

	AMOUNT
Prescription Drugs	__________
Insurance Premiums (Health, Dental & Vision)	__________
Medicare Premiums	__________
Long Term Care Premiums	__________
Doctors and Dentists	__________
Hospitals and Labs	__________
Medical Equipment and Supplies	__________
Other (Glasses, Hearing Aids & Miscellaneous)	__________

Medical Miles ______________________

____ Real Estate Taxes

1st Home ________

2nd Home ________

Land ________

____ DMV Fees (Net VLF) ________

____Sales Tax paid for large purchases $______________

(Large purchase is a Car, Boat, RV, and ECT)

AMOUNT

____ Mortgage Interest Paid (Bring in Lender Statements)

1st Home ________

2nd Home ________

Land ________

____Mortgage Insurance Premiums paid on home purchase **(PMI, MIP)** ________

____ Giving By Cash/Check (**must have receipts**) ________

____ Giving Non-Cash (**must have receipts**) ________

____ Charitable Miles ________

____ Union Dues ________

____ Tax Return Preparation Fees ________

____ Work Related Expenses (Need to Itemize)

See Our Web Site for a List of occupational deductions at www.teamtax.com

____

____

____

____ Work Related Non-Reimbursed Miles, ____________**MUST HAVE DETAILED LOG BOOK!**

CHILD CARE EXPENSES:

Providers Name: ________________________________

Address: ________________________________

SS# or Tax ID: ________________________________

Amount Paid: ________________________________

Provider's Phone Number: ________________________________

Providers Name: ________________________________

Address: ________________________________

SS# or Tax ID: ________________________________

Amount Paid: ________________________________

Provider's Phone Number: ________________________________

Dependent Care Benefits (Amount Your Employer Paid)

AMOUNT IN BOX 10 OF YOUR W-2 (if any): ________________________________

OTHER

AMOUNT

____School Tuition Paid (Student's Name, Tuition Paid, Full or Part-Time) ________

____Student Loan Interest Paid ________

_______ Foreign Bank Accounts, Brokerage & Other Assets. Please let us know.

Alternative Minimum Tax Issues

___________Amount of mortgage not related to purchase or improvement of first or second home.

___________Amount of incentive stock options **(ISO)** exercised and not sold.

Energy Efficient Related Credits

Did you purchase Energy Efficient A/C, Water Heater, Windows? $__________
Did you purchase an electric, Fuel Cell or hybrid vehicle? $__________
Did you add solar power? (Non pool or spa) $__________
Did you purchase other Energy Efficient items? (non appliance) $__________
Explain____

CA SALES OR USE TAX

$___________Amount of purchases made over the Internet, by mail, or by phone order where no California sales or use tax was paid if paying use tax on this tax return. This amount will be used to calculate CA sales tax due.

ESTIMATED TAX PAYMENTS AND DATES PAID

	Q1	Q2	Q3	Q4
Federal	_______	_______	_______	_______
State	_______	_______	_______	_______

CHANGES

____ Address
____ Dependents
____ Marital Status
____ Occupation
____ Refinance, Home Purchase, Home Sale (Bring In Escrow Statement)
____Foreclosure, Short Sale, & Abandonment of Property

OTHER (NEW CLIENTS)

Be sure all names you provide us match what is on your Social Security Cards or Social Security Records. Please bring in last year's tax return.

ADDITIONAL INFORMATION:

We have lots of detailed worksheets you can download from our website, **www.teamtax.com** these worksheets include: Business, Rental and Occupational Specific expense deductions. You may also stop by the office to obtain these worksheets.

Tax Services

- Individual and Small Businesses
- Partnerships, Sub-Chapter S, and C Corporations, LLCs
- Non-Profit (Tax Exempt) Organizations
- Trust and Estate Returns
- Premier Services Plan
- Tax Planning
- Business Planning Including Start-ups
- Tax and Business consulting
- IRS and FTB Audit and Problem Representation, including Audit Notices, Offers In Compromise, Levies, Liens, and Payment Plans
- Back Taxes filed
- U.S. Tax Court Representation

Insurance Services

- Auto & Homeowners Insurance
- Motor Home Insurance
- Earthquake Insurance
- Commercial Insurance
- Condo Insurance
- Mobile Home Insurance
- Watercraft Insurance
- Motorcycle Insurance

Investment Advisory and Financial Planning Services Available Through;

Jeffry S Cole, CFP®, *Leonard P Cole, CFP®, & *Karen Corcoran

*Securities offered through H.D. Vest Investment Services SM, Member: SIPC,
*Advisory Services offered through H.D. Vest Advisory Services SM,
Non-bank subsidiaries of Wells Fargo & Company.
*Karen Corcoran and Corcoran Wealth Management are not affiliated with TeamTax, Jeffry Cole, or Leonard Cole.

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