

2009
INCOME TAX

APPOINTMENT DATE ____ / ____ / ____

APPOINTMENT TIME ____ : ____ AM / PM

____ : ____ AM / PM

PLEASE USE PENCIL / CORRECT PRINTED DATA IF NECESSARY

NAME: (T) TAXPAYER _____ SS# ____ / ____ / ____

(S) SPOUSE _____ SS# ____ / ____ / ____

BIRTHDATES: (T) _____ OCCUPATION: _____ 65 BLIND

(S) _____ OCCUPATION: _____ 65 BLIND

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

COUNTY: _____ SCHOOL DISTRICT: _____ CODE: _____

TELE #: (HOME) _____ (CELL) _____ (WORK) _____

E-MAIL: (T) _____ (S) _____

PRESIDENTIAL ELECTION: \$3.00 (T) YES NO (S) YES NO

FILING STATUS: SINGLE HEAD OF HOUSEHOLD

MARRIED/JOINTLY QUALIFYING WIDOW (ER)

MARRIED/SEPARATELY: SPOUSES NAME: _____

SPOUSE S.S. #: ____ / ____ / ____

CAN BE CLAIMED ON ANOTHER'S RETURN? YES

DEPENDANTS (FIRST, LAST)	BIRTH DATE	SOCIAL SECURITY #	HOW RE- LATED	#MO 2009	CHILD TAX CREDIT (UNDER 17)

TOTAL EXEMPTIONS _____ INCLUDING TAXPAYER AND SPOUSE

(OFFICE ONLY) EF DD CKG SAME ACCT STAR

MAIL CHECKS SVGS NEW ACCT PICKUP

INCOME

FORM W-2: WAGES

T	S	TAXABLE WAGES	FED W/H	S.S. TAX	MDCR TX	ST. W/H	NYS 414 (H)	DCB	EMPLOYER
					TOTALS				
				S.S. TAX OVER \$6,621.60 EACH					

(I) INTEREST & (D) DIVIDEND INCOME

T = TAXPAYER, S = SPOUSE, J = JOINT

T	S	J	I/D	SOURCE	TOTAL	QUALIFIED	CAP GAIN DIST	FOREIGN TAX	TAX EXEMPT INTEREST		
									FWT	NON TXBL	STATE TXBL
TOTAL INTEREST											
TOTAL DIVIDENDS											

DO YOU HAVE ANY FOREIGN ACCOUNTS OR SIGNATURE AUTHORITY TO USE ANY FINANCIAL ACCOUNTS IN A FOREIGN COUNTRY?

Yes No

IF YES, PLEASE PROVIDE THE NAME(S) OF THE FOREIGN COUNTRY? _____

PLEASE PROVIDE THE FOREIGN ACCOUNT BALANCE(S): _____

INCOME (CONTINUED)

DESCRIPTION	GROSS	TAXABLE	TAXPAYER	SPOUSE	FWT
ST. TAX REFUND					
1040C / SELF EMP.					
1040D / CAP GAINS					
1040E / RENTAL PROPERTY					
K-1'S					
PENSIONS:					
PENSIONS:					
IRA:					
IRA:					
ALIMONY					
UNEMPLOYMENT COMPENSATION (TAX FREE UP TO \$2,400)					
SOCIAL SECURITY					

ADJUSTMENTS / CREDITS

ITEM	TOTAL		TOTAL
IRA / SEP / SIMPLE / ROTH		MOVING EXPENSE	
COLLEGE TUITION DED		DOMESTIC PRODUCTION DEDUCTION	
STUDENT LOAN INT		ADOPTION CREDIT	
529 COLLEGE SAVINGS DED (NYS)		MAKING WORK PAY CREDIT & GOVT RETIREE CREDIT	AMT RCVD 2009 CREDIT
EDUCATORS' EXPENSE		RESIDENTIAL ENERGY TAX CREDITS	
SAVINGS PENALTY/ALIMONY PAID		RETIREMENT SAVINGS TAX CREDIT	
HEALTH SAVINGS ACCOUNT		EDUCATION CREDITS (AMERICAN OPP / LIFETIME)	
SELF-EMPLOYED HOSPN (100%)		HOMEBUYER'S CREDITS (EXISTING \$6,500 / FIRST TIME \$8,000)	
1/2 SOC SEC (IF SELF EMPLOYED)		NYS: COLLEGE TUITION CREDIT / ITEMIZED DEDUCTION	

CHILD CARE CREDIT (UNDER 13)

W-2 AMOUNT _____

NO. CHILDREN _____

AMOUNT PAID \$ _____

FEDERAL RATE _____ %

FED. CREDIT \$ _____

NYS RATE _____ %

NYS CREDIT \$ _____

PROVIDER: _____

I. D. # : _____

ADDRESS: _____

STUDENT NAME:		
COLLEGE NAME & ADDRESS		
TUITION & FEES		

ESTIMATED TAX PAYMENT RECORD

		FEDERAL	STATE
	2008 OVERPYMT.	\$	\$
#1	4/15/2009	\$	\$
#2	6/15/2009	\$	\$
#3	9/15/2009	\$	\$
#4	1/15/2010	\$	\$
	TOTALS	\$	\$

