

Dear Tax Client,

Tax Season is with us again! We hope all of our tax clients have had a healthy and successful year. As in prior years, we are providing you with a reminder list of items you may need for preparing your income tax return for the year 2009. **If you require a complete Income Tax Questionnaire, please contact our office, and we will be happy to send you a personalized copy.** Our staff is looking forward to seeing you again, and thank you for your continued business.

Income Items to be aware of:

- Unemployment Income (1099-G)
- Wage Statements (W-2s)
- IRA and Pension Statements (1099-Rs)
- Social Security Statements
- 1099 for Interest, Dividends (including Foreign Accounts)
- K-1s for Partnerships/S-Corporations
- Real Estate Income and Related (Rental) Expenses
- Gambling Winnings and Losses (W-2G)
- Paperwork for Real Estate Sales – Closing Statement
- Stock Sales (Cost, Selling Price and Dates) Form 1099B
- Business Income and Expenses
(If we do not do your accounting)
- Jury Duty, FIA and SSI
- Alimony Received
- 1099A, 1099C etc. (Cancellation of Debt)
- State and City Refunds (Form 1099-G)

Other Items to watch for:

- Estimated Taxes Paid and Dates Paid
(Federal, State and MBT)
- Year End Inventory (Business clients)
- Birth Dates and Social Security Numbers for all Dependents
- Child Support Payments Received
- Amount of Recovery Rebate Check Received
- Foreign Account Values over \$10,000

Deductions to watch for:

- Sales Tax paid on New Vehicle, Motorcycle or Motorhome
- Vehicle License Plate Cost
- Medical Insurance, Mileage, COBRA, Medical Bills Paid, and Long Term Care
- Real Estate Taxes Paid
- Mortgage Interest Statements (form 1098)
- Charitable Contributions (Cash/Non-Cash)
- Cottage & Boat Interest Paid (if used as vacation home)
- Child Care Expenses
(Tax ID number and address of the provider)
- Union Dues, Safe Deposit Box, Job Tools
- Job Supplies, Uniforms & Parking
(If not paid by your employer)
- College Tuition and Adult Education Expense
(Tax Payer or Children)
- IRA + Roth Contribution
- 529 Michigan Education Plans
- Alimony Paid - also provide former Spouse's SS#
- Job Hunting Expenses
- Professional Dues
- Educator Expenses
- Energy-Efficient Home Improvements & Appliances
- Ponzi Scheme Losses
- First Time & Replacement Home Buyer Credit
(copy of Settlement Statement)

State of Michigan Property Tax Credit

- Please be sure to bring your 2009 Summer & Winter Property Tax Bills and the Taxable Value of your main residence

If you are requesting a certain tax preparer, please let us know when you make your appointment.

Thank you,

Your Tax Staff at BRS Accounting and Tax Service

BOB EDER JR. CINDY KNOX CHRIS ACKERMAN
MIKE EDER KAREN KASSIN

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