A+ TAXES AND BOOKKEEPING PHONE: (781) 272-0666
BURLINGTON MA FAX: (781)272-0666

Due to electronic filing no original documents are now required from you to file your return. Your tax return can be handled much more efficiently if you fax your documents instead of mailing them. Please fax all your tax documents to 781-272-0666. Please indicate number of pages faxed to ensure completeness.

Please provide as much information on the questionnaire itself. Attach extra sheets only if you need to provide additional information.

I will prepare your income tax returns based on the information you provide me. I will not audit or otherwise verify the information you provide to me. Please ensure that the information you provide accurate, complete and that your claimed expenses are supported by records as required by law. These records are required in case you need to substantiate your deductions to a taxing authority. The law requires you to be responsible for the information contained in your tax return. You should review your return carefully before approving it for filing purposes.

Checklist for your tax return:

Please go thru the following checklist before sending your documents to ensure you have enclosed all the

Relevant tax documents:

• Copy of Form W-2
• Copy of Form 1099 from Interest, Dividends, Moonlighting & other
• Copy of Form 1098 from mortgage lenders, universities & other
• Cancelled check (If you prefer a direct deposit of refund in your bank account)
• Copy of your last year's tax return, if we did not prepare it
• Any other any item relevant to your tax return that you have not mentioned in the questionnaire
• Do not send any receipts unless specifically requested.

Communication and Coordination:

Feel free to communicate via email as I regularly check my email throughout the day and respond promptly.

You can email your questions or concerns to neil@aplustaxesandbookkeeping.com

Or feel free to call me @ (781) 272-0666

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2009 INCOME TAX QUESTIONNAIRE

INFORMATION ☐ CHECK THIS BOX IF THE SAME AS LAST YEAR. NEW CLIENTS PLEASE FILL OUT.

TAXPAYER:

LAST NAME ______________________

FIRST NAME ______________________

MIDDLE NAME ______________________

SOCIAL SECURITY # ______________________

OCCUPATION ______________________

DATE OF BIRTH ______________________

CELL PHONE # ______________________

CITIZENSHIP ______________________

SPOUSE:

LAST NAME ______________________

FIRST NAME ______________________

MIDDLE NAME ______________________

SOCIAL SECURITY # ______________________

OCCUPATION ______________________

DATE OF BIRTH ______________________

CELL PHONE # ______________________

CITIZENSHIP ______________________

ADDRESS ____ **APT#** ____________

CITY ______________________________ **STATE** ______________ **ZIP CODE** ________

HOME PHONE _______________ **EMAIL** ______________________ **REFERRED BY** __________

DEPENDENTS ☐ CHECK THIS BOX IF THE SAME AS LAST YEAR. NEW CLIENTS PLEASE FILL OUT.

FIRST NAME	MI	LAST NAME	SOCIAL SECURITY	RELATIONSHIP	DATE OF BIRTH

CREDITS

DEPENDENT CARE CREDIT: NAME OF PROVIDER __________________________AMOUNT PAID $________

PROVIDERS ADDRESS ____ TAX I.D. # OR SS# ______________

TUITION CREDIT: TUITION PAID FOR SELF, SPOUSE, OR DEPENDENTS FOR COLLEGE COURSES $____________

PLEASE FAX ALL TAX DOCUMENTS TO (781) 272-0666

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INCOME

WAGES: INCLUDE ALL COPIES OF FORM W-2 RECEIVED FROM EMPLOYERS

OTHER EARNED INCOME: INCLUDE ALL COPIES OF FORM 1099-MISC

INTEREST AND DIVIDENDS: INCLUDE ALL COPIES OF FORM 1099-INT AND 1099-DIV

CAPITAL GAIN / LOSS: INCLUDE ALL COPIES OF FORM 1099-B

S CORP / PARTNERSHIP: INCLUDE ALL COPIES OF FORM K-1

RENTAL INCOME: LIST RENTAL INCOME AND EXPENSES ON A SEPARATE SHEET OF PAPER

PERSONAL DEDUCTIONS

IRA: CONTRIBUTION FOR THE YEAR TAXPAYER

☐ REGULAR ☐ ROTH $_________ SPOUSE ☐ REGULAR ☐ ROTH $_________

EDUCATION IRA / SEC.529 CONTRIBUTIONS AND PLAN NAME $_____________________

SEP IRA CONTRIBUTIONS $____________________

MOVING EXPENSE: DATE MOVED________ MOVED FROM_____________ TO ________________

☐ CHECK THIS BOX IF MOVE IS JOB RELATED

HOW MANY MILES DID YOU TRAVEL IN YOUR PERSONAL AUTO TO MOVE FAMILY AND PERSONAL EFFECTS______

AIR FARE $__________ TRUCK RENTAL $___________ FUEL $_________ LODGING $__________

MEDICAL EXPENSES: INSURANCE $__________ OUT OF POCKET MEDICAL EXPENSES $_____________

TAXES: PERSONAL PROPERTY TAX $__________ REAL ESTATE TAX $_________ SALES TAX ON NEW CAR $_______

INTEREST: MORTGAGE INTEREST $_________ HOME EQUITY INTEREST $______ INVESTMENT INTEREST $______

CHARITY: CASH OR CHECK $________ (EACH DONATION >$250. REQUIRES A RECEIPT AND COPY OF CHECK)

NON CASH (CLOTHING ETC.) $_______ (TOTAL DONATION >$500 REQUIRES DETAILS OF DONATION)

MISC EXPENSES: TAX PREP FEE $______ INVESTMENT FEE $________ SAFE DEPOSIT BOX $_______

ESTIMATED TAX PAYMENTS

PLEASE LIST ANY ESTIMATED TAX PAYMENTS YOU HAVE MADE THIS YEAR

FEDERAL: 1ST QUARTER $_____ 2ND QUARTER $______ 3RD QUARTER $______ 4TH QUARTER $______

STATE: 1ST QUARTER $_____ 2ND QUARTER $______ 3RD QUARTER $______ 4TH QUARTER $______

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PROFESSIONAL DEDUCTIONS

GENERAL	TAXPAYER	SPOUSE	EDUCATIONAL & JOB SEARCH EXP.	TAXPAYER	SPOUSE
PROF. DUES			CONTINUING EDUCATION		
PRO. SUBSCRIPTIONS			SEMINARS AND CONFERENCES		
INTERNET ACCESS FEES			LEGAL FEES		
PROF. LICENSES			RECRUITING FEES		
PROF. BOOKS AND COURSES			AIR /AUTO / CAB FARES		
PROF. EXAMINATIONS			LODGING		
LONG DISTANCE / CELLULAR			PRINTING AND SUPPLIES		
CLOTHING FOR WORK			MEALS		
			POSTAGE		
			COMPUTER (COST AND PURCHASE DATE)		

AUTO USAGE FOR WORK	TAX PAYER	SPOUSE
EDUCATION MILES		
JOB SEARCH MILES		
MILES FROM FIRST JOB TO SECOND		
TOTAL DEDUCTABLE MILES		
HOME TO WORK AND BACK MILES		
OTHER PERSONAL MILES		
PARKING FEES AND TOLLS		
VEHICLE BOUGHT OR LEASED		
DATE AUTO WAS ACQUIRED		
COST OF PURCHASE (IF PURCHASED)		
INSURANCE AND MAINTENANCE		
MONTHLY PAYMENT		

Your auto deduction is based on number of miles you use it for business/ professional purposes. Business/ Professional use includes mileage for seminars and conferences, job search and driving between work Locations. Mileage you drive from home to work and back as well as personal usage is not deductible. However mileage from home to work and back on a temporary work assignment is deductible. A temporary work assignment is one that lasts less than one year. Please note that you are required to keep a log of auto usage. Log books are commonly available in office supply stores.

TAX PAYMENTS AND REFUNDS

☐ CHECK THIS BOX IF YOU WOULD LIKE STATE AND FEDERAL REFUNDS TO BE DIRECTLY DEPOSITED INTO YOUR CHECKING ACCOUNT. DIRECT DEPOSIT OF REFUND IS RELATIVELY QUICK AND SECURE.

BANKING INFORMATION FOR DIRECT DEPOSIT OR ELECTRONIC PAYMENT

BANK NAME ________________BANK ROUTING # _ _ _ _ _ _ _ _ _ BANK ACCOUNT #_ _ _ _ _ _ _ _ _ _

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