



# INCOME TAX PREPARATION CHECKLIST

## In 2009, did you (or your spouse) receive income from any of the following:

- Wages – **W2(s)**
- Interest or Dividends – **1099 Div or Int**
- Retirement or IRA Distribution – **1099 R**
- Partnership or S-Corporation – **K1(s)**
- Unemployment – **1099 G**
- State Income Tax Refund
- Alimony
- Social Security Benefits – **1099 SSA**
- Operating a Business/Self Employment
- Operating a Farm
- Rental property
- Gambling winnings
- Royalties – **K1(s) or 1099 Misc**
- Miscellaneous or Other Income – **1099 Misc**

## In 2009, did you (or your spouse) sell or dispose of any:

- Stocks, Mutual Funds or Bonds – **1099 B**
- Personal Residence – **Closing Statement**
- Rental Property or Other Personal Property  
If so are you receiving installments?

## In 2009, did you (or your spouse):

- Contribute to an IRA, SEP, or Keogh Plan
- Pay interest on student loans
- Pay for post secondary education – **1098 T**
- Have a home mortgage, a second mortgage or a home equity loan – **1098**
- Pay real estate taxes (This year there is an additional amount add to your Standard Deduction for Real Estate taxes paid on your home) – **Tax Statement or 1098**
- Pay medical expenses and/or private health or Long Term Care insurance premiums
- Make contributions to a charity or church  
Over \$500 in non-cash items must be documented
- Suffer a casualty loss
- Have out-of-pocket job expenses
- Incur Job Hunting expenses

- Pay alimony
- Pay child or dependent care expenses
- Send payments to IRS for 2009 taxes
- Receive any letters or notices from the IRS
- Cash in a Life Insurance Policy or Annuity

## Things to keep in mind:

Did you buy a new car or new personal residence in 2009?

Social Security number and date of birth are required for all individuals listed on a tax return.

W2s and 1099s should be mailed by Jan 31<sup>st</sup>.

Mortgage interest and real estate taxes paid can be usually obtained at an 800# (in coupon book).

If you sold stock you will need to know its original cost and purchase date.

You have until 4/15/10 to established 2009 IRAs (Traditional, Roth, SEP, or Education).

Do you have Schedule D losses carry forwards?

State sales tax is deductible on Schedule A.

With the problems at the post office are you going to e-file?

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