

2009

INCOME TAX INFORMATION

2009

	Taxpayer (You)	Taxpayer (Spouse)
Name		
Social Security Number		
Occupation		
Date of birth		
Home address	Street:	
	Town:	State: Zip Code:
	Owned () Rented () County:	
Telephone Number	Home: ()	Cell: ()
	Business: ()	Fax: ()
Current e-mail address		

CHILDREN AND OTHER DEPENDENTS

Name (First and Last)	Social Security Number	Date of Birth	Relationship	Gross Income	College Student?	College 529 Plan?

NOTE: For Child Care Credit, please provide Name, Address, Identification Number and amount paid to each provider (if applicable)

WAGES AND SALARIES

<<< PLEASE ATTACH ALL COPIES OF ALL W-2 FORMS >>>

INTEREST AND DIVIDEND INCOME

ATTACH ALL FORMS 1099 you received from Banks, Credit Union, Notes, U.S. Savings Bonds, Private Mortgages, investments in Corporations, etc. List any interest or dividends for which a Form 1099 was not received. (For seller financed mortgages on personal residences, provide the name, address and Social Security Number of the payor.)

ESTIMATED INCOME TAX AND SOCIAL SECURITY DATA

	Due Date	FEDERAL		STATE		CITY	
		Date Paid Mo/Day/Yr	Amount	Date Paid Mo/Day/Yr	Amount	Date Paid Mo/Day/Yr	Amount
Credit from 2008			\$		\$		\$
1st installment	4/15/2009		\$		\$		\$
2nd installment	6/16/2009		\$		\$		\$
3rd installment	9/15/2009		\$		\$		\$
4th installment	1/15/2010		\$		\$		\$
Totals			\$		\$		\$

Social Security: Total Benefits received for 2009 (Attach form(s) 1099-SSA)	You:	\$
	Spouse:	\$

2009 TAX EXEMPT INTEREST AND DIVIDEND INCOME 2009

<<< Attach Forms 1099-INT you received for TAX EXEMPT Interest >>>

HWJ*	Source	Amount	HWJ*	Source	Amount

*Enter H (husband), W (wife), or J (joint) for name in which ownership of asset is held.

CAPITAL GAINS AND LOSSES

<<< Attach Forms 1099-B received and enter sales of Securities (STOCK, BONDS, etc.) >>>

HWJ*	Kind of property and description (Example: 100 shares of "Z" Co.)	Date ACQUIRED (Mo/Day/Yr)	Date SOLD (Mo/Day/Yr)	PURCHASE Price	SALES Price	GAIN or (LOSS)

*Enter H (husband), W (wife), or J (joint) for name in which ownership of asset is held.

OTHER INFORMATION

DO YOU HAVE ANY OF THE FOLLOWING? If Yes, please furnish details on page 4

	YES	NO		YES	NO
<i>Unpaid sales tax on out of state purchases</i>			NYS "College Choice" payments		
Pension or Annuity income (attach all 1099's)			Grade K-12 Teacher Expenses		
KEOGH plan (attach all 12/31/09 statements)			Gifts of more than \$13,000		
Long Term Care per diem over \$280 per day			Operation of a farm		
Business use of personal auto			Rent or Royalty income		
Job related moving expenses			Volunteer NYS EMT or Firefighter		
Alimony paid (indicate amount) \$ _____			Partnership K-1(s) (4)		
Alimony received (indicate amount) \$ _____			"S" Corporation K-1(s) (4)		
Hurricane, Flood, Casualty or Theft loss			Estate or Trust K-1(s) (4)		
Purchase or lease of a new car, SUV or boat (1)			Jury duty income		
Energy related improvements to residence ** (1)			Directors fees or Commissions		
Same sex marriage or civil union (2)			Gambling or Lottery winnings (5)		
Purchase or Sale of principal residence (3)			IRS/State tax notices/adjustments		

**Energy related improvements: See important note on page 4 for documentation requirements

(1) Attach copy of bill of sale (2) Attach details (3) Attach closing statements (4) Attach K-1's (5) Attach Forms 1099-G

INDIVIDUAL RETIREMENT ACCOUNTS - IRA's ***

	YOU	SPOUSE
<i>Traditional Deductible</i> IRA - amount contributed	\$	\$
<i>Non Deductible</i> IRA - amount contributed	\$	\$
<i>Roth</i> IRA - amount contributed	\$	\$

***Note: IRA contributions for 2009 must be made no later than April 15, 2010

DIRECT DEPOSIT OF REFUND

If you would like direct deposit of your refund, check here and include a voided check from your checking account.

Note: ALL tax returns will be filed electronically as required by federal, state and local law.

