

TAX WORKSHEET

NAMES _____ **TAX YEAR 2009**
Address _____ **School District:** _____
Telephone (Home) _____ **(Work)** _____ **(Cell)** _____
Social Security Numbers: Yourself _____ Spouse _____
Birthdate(s) Yourself _____ Spouse _____

Dependents. NOTE: All dependents must have a social security number.

First Name and _____
 Middle Initial _____
 Social Security No. _____
 Date of Birth _____

If Iowa resident, how many dependent children do not have health care coverage? _____

Do you (and your spouse) want \$3 of your federal income liability to go to the Presidential Election Campaign Fund [it does not increase your taxes]? Yes No

Do you (and your spouse) want \$1.50 of your Iowa income tax liability to go to the Iowa Republican or Democratic Party, or 75¢ to each Party [it does not increase your taxes]?
 To Republican To Democratic One-half to Each No Checkoff

***** REPORTABLE INCOME *****

WAGES, SALARIES, TIPS, ETC.: Bring to the office all of your W-2 forms. List below names of your employer(s):

INTEREST INCOME: Bring to the office all of your 1099 forms showing interest payments to you. List below the names of persons who paid mortgage or real estate contract interest to you:

List below all other institutions or persons paying interest to you:

Also, list below all entities that paid you tax exempt interest, and the amount:

_____ \$ _____
 _____ \$ _____

DIVIDEND INCOME: Bring to the office all of your 1099 forms showing dividend payments to you. Under new tax laws there is a lower tax rate for "qualified dividends". List below the names of companies which paid dividends to you:

SOCIAL SECURITY RECEIVED: A portion of your social security payment may be taxable. Bring to the office your Forms 1099/SSA showing total social security benefits.

PARTNERSHIP, LIMITED LIABILITY COMPANY, S-CORPORATION, ESTATE AND TRUST INCOME: Bring to the office all of the Forms K-1 you received reporting your share of income.

MISCELLANEOUS INCOME:

Pension, IRA, or Annuity Income _____ \$ _____
 _____ \$ _____
 Unemployment compensation _____ \$ _____
 Alimony (not child support) received _____ \$ _____
 Disability Income from _____ \$ _____
 Other _____ \$ _____
 _____ \$ _____

TAX REFUNDS RECEIVED IN 2009: Federal: \$ _____ State: \$ _____

HIGHER EDUCATION EXPENSES:

Student name _____ Year in College _____ Tuition & Fees \$ _____
 Course Materials \$ _____ School attended: _____ Room & Board (if Midwest) \$ _____
 Student name _____ Year in College _____ Tuition & Fees \$ _____
 Course Materials \$ _____ School attended: _____ Room & Board (if Midwest) \$ _____
 Student Loan Interest Paid \$ _____

CERTAIN EXPENSES (If you check yes, please provide supporting information):

Did you purchase a clean-fuel vehicle in 2009? Yes _____ No _____
 Were you a first-time home buyer in 2009? Yes _____ No _____
 Did you make energy-efficient improvements to your home? Yes _____ No _____

INFORMATION FOR CHILD OR DEPENDENT CARE EXPENSES:

Number of persons cared for during year (_____)

PROVIDER'S NAME	ADDRESS	SSN/EIN	AMOUNT