

TAX RETURN INFORMATION

1. Current e-mail address; *your tax returns will be sent to you at this address*
2. Social Security Numbers for dependent children (unless I already have them)
3. Any notices received from I.R.S., State or City
4. Clergy pay package (salary, housing, auto, etc.) for 2010 and 2011
5. Housing expenses—including mortgage payments, insurance, utilities, furnishings—to support use of housing allowance
6. Fair rental value of parsonage or owned home
7. W-2's from employers
8. 1099's (interest income, dividends, distributions from IRA's, pension payments, social security, unemployment, cancellation of debt, etc.)
9. Tax-exempt interest income (from municipal bonds, etc.)
10. Total honoraria from weddings and funerals, and related expenses
11. Information regarding any sales of property, stocks, bonds, etc.—including date of sale and price, and purchase date and cost
12. Amounts connected with any rental property—including income, miles traveled, insurance, mortgage interest, taxes and repairs
13. K-1's (partnership and S-corporation distributions)
14. IRA contributions
15. Unreimbursed medical expenses, if significant in amount
16. Real estate taxes paid
17. Mortgage interest paid (include Form 1098)
18. Documents on any refinancing of home mortgage (HUD-1 statement)
19. Charitable contributions—cash and checks
NOTE: If you are able to itemize deductions, please complete contribution worksheet and send cancelled checks and/or contribution receipts to validate the amount of your charitable contributions. I will return originals to you, or you may send copies if you prefer. (You must have a proper receipt for any single contribution of \$250 or more.)
20. Charitable contributions—noncash
NOTE: Deductions for noncash contributions must meet strict documentation requirements. Please provide store receipts for any items purchased in 2010 and donated to a charitable organization, Form 1098-C for a donated automobile, or a qualified appraisal for gifts of valuable property.

(over, please)

21. Job-related moving expenses
22. Automobile mileage (*not required if directly reimbursed at standard rate*)
 - Total 2010 miles for each car
 - Business miles for each car
23. Unreimbursed professional expenses—including office supplies, vestments, cleaning costs, publications, entertainment, continuing education, etc. *Cost of business meals and entertainment must be totaled separated from other expenses.*
24. Tax preparation fees paid during 2010
25. Child care expenses, if you and spouse both work—also need name, address and social security numbers of care providers
26. Closing documents on real estate purchases (HUD-1 statement)
27. Interest payments on educational loans (Form 1098-E)
28. Information and related documents concerning tuition payments (Form 1098-T *and college's account statement showing all charges and payments*)
29. Estimated tax payments—federal, state, city, and school district. *Please be sure to list the date and amount of each payment.*
30. Certificate and receipts for any energy-efficient home improvements.
31. Total amount of out-of-state purchases (made by phone, from catalogs, on the internet, etc.) on which sales tax was not collected—not including purchases of food, prescription drugs, and newspapers/magazines sent by 2nd class mail. *This may not apply to residents of all states.*
32. Copies of your 2009 tax returns, if I don't already have them
33. Estimated non-clergy salary, income, and deductions for 2011
34. Income of dependent child if it exceeds \$950 and includes any interest/dividend/other unearned income (if it does not include unearned income, only required if earned income exceeds \$5,700)
35. Engagement Letter signed by both spouses
36. Client Use Agreement signed by both spouses (optional)
37. Any other information which you think may be helpful
38. Any specific questions or concerns you may have