



*Margaret M. Benson LLC*  
Certified Public Accountant

If you have not filed your taxes with us before we will need the following.

If you filed with us last year, just use this as a list of thing to gather up and add any new information like new dependents, address or phone etc.

You and your spouse's names

**Print please**

You \_\_\_\_\_ SSN \_\_\_\_\_

Spouse \_\_\_\_\_ SSN \_\_\_\_\_

Dates of births: You mm/dd/yyyy \_\_\_\_\_ Spouse mm/dd/yyyy \_\_\_\_\_

Current Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Occupations Yours \_\_\_\_\_ Spouse \_\_\_\_\_

Last years' address if it changed

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Do you or your spouse want \$3 of the government's money to go to the Presidential Election Campaign Fund?

**Yes or No PLEASE CHOOSE ONE FOR EACH** You \_\_\_\_\_ Spouse \_\_\_\_\_.

Evening phone \_\_\_\_\_

Daytime phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email address \_\_\_\_\_

Active Military \_\_\_\_\_

Blind \_\_\_\_\_

**Required: Include a copy of your prior year's taxes (if we did not do your taxes last year)**

**Have you received any letters from the IRS? Bring or send them.**

**Dependents:**

**Non-custodial Parent**

If you are a noncustodial parent claiming an exemption, you will need a signed release form 8332 or a similar statement from the custodial parent. The exemption can be released for 1 year or for a number of specified years (for example, alternate years) or for all future years, as specified in a declaration.

**Print please**

Name \_\_\_\_\_

Dates of birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Relationship to you ----- son----daughter--etc \_\_\_\_\_

Gross Income \_\_\_\_\_ if any (W2, interest income etc)

Months resided in your home (if not 12) \_\_\_\_\_

Support received from you (elderly parents, disabled child, etc.) \_\_\_\_\_

Name \_\_\_\_\_

Dates of birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Relationship to you ----- son----daughter--etc \_\_\_\_\_

Gross Income \_\_\_\_\_ if any

Months resided in your home (if not 12) \_\_\_\_\_

Support received from you (elderly parents, disabled child, etc.) \_\_\_\_\_

Name \_\_\_\_\_

Dates of birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Relationship to you ----- son----daughter--etc \_\_\_\_\_

Gross Income \_\_\_\_\_ if any

Months resided in your home (if not 12) \_\_\_\_\_

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Name \_\_\_\_\_

Dates of birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Relationship to you ----- son----daughter--etc \_\_\_\_\_

Gross Income \_\_\_\_\_ if any

Months resided in your home (if not 12) \_\_\_\_\_

Support received from you (elderly parents, disabled child, etc.) \_\_\_\_\_

**Income:**

We will need all statements of income and Wages like:

W-2, 1099, Interest Income, Municipal Bond Interest, Installment Sale Payments Received, Retirement Plan Distributions 1099R, Partnerships, Estates, Trusts, S Corporations reports and schedules K-1, Social Security Benefits SSA-1099, Railroad Retirements RRB-1099.

**Other Incomes:**

Federal income tax refund, State income tax refund 1099G, Unemployment compensation 1099G, Alimony received (Not Child support), Commissions and fees, Tips not reported on W-2, Farm income, Bonuses and prizes not on W-2, Jury duty – Election board fees, Gambling lottery's, Bartering, Workers compensation, Veterans pension and disability, Investment Interest, and all other incomes not listed.

**Securities:**

You must have the **date & price** paid for each stock. Then you need the sold date and price received. This information will be on the statements you received at time of purchase and sale.

**Self Employed Income and losses, Rental Income:**

You will need all your costs of operations, inventory's held, gross sales etc.

You should have a general ledger or call us for help to create the proper income and expense reports. If you use a program like QuickBooks call for instruction on how to send us a file copy.

**Reports take time to be created; it can delay the filling of your taxes. So don't delay, call us for help now at 651 405 8337.**

**2009 Standard Mileage Rates:** you will need the beginning and ending mileage for the year and how much was used for business, charitable, medical or moving expense.

WASHINGTON — The Internal Revenue Service today released the optional standard mileage rates to use for 2005 in computing the deductible costs of operating an automobile for business, charitable, medical or moving expense purposes. Beginning Jan. 1, 2006, the standard mileage rates for the use of a car (including vans, pickups or panel trucks) will be:

- 55 cents a mile for all business miles driven.
- 24 cents a mile when computing deductible medical or moving expenses,
- 14 cents a mile when giving services to a charitable organization.

**Home office:**

If you have a home office we will need costs to maintain it and area it takes up in the home. (Example: you have a 10’ X 20’ = 200 sq ft office in an 1800 sq ft home, etc)

**Daycare:**

You can use either the standard meal and snack rates or actual costs to calculate the deductible cost of food provided to eligible children in the family daycare for any particular tax year. If you choose to use the standard meal and snack rates for a particular tax year, you must use the rates for all your deductible food costs for eligible children during that tax year. However, if you use the standard meal and snack rates in any tax year, you can use actual costs to compute the deductible cost of food in any other tax year.

If you use the standard meal and snack rates, you must maintain records to substantiate the computation of the total amount deducted for the cost of food provided to eligible children. The records kept should include the name of each child, dates and hours of attendance in the daycare, and the type and quantity of meals and snacks served. This information can be recorded in a log similar to the one shown in Exhibit A, later.

The standard meal and snack rates include beverages, but do not include non-food supplies used for food preparation, service, or storage, such as containers, paper products, or utensils. These expenses can be claimed as a separate deduction on your Schedule C (Form 1040).

Table 3. Standard Meal and Snack Rates for 2009

Location of Family Daycare Provider	Breakfast	Lunch	Dinner	Snack
States other than Alaska and Hawaii	\$1.17	\$2.18	\$2.18	\$0.65
Alaska	\$1.86	\$3.53	\$3.53	\$1.05
Hawaii	\$1.36	\$2.55	\$2.55	\$0.76

**Percentage of time includes:**

Caring for children, cleaning up the house before and after children are present (1hr per day). Meal planning and preparation & shopping list preparation out side of daycare time. Preparing activities for the day care. Interviewing prospective parents and talking to parents on the phone. Time for keeping the records and paperwork. Time spent away from home shopping does not count.

## **Deductions:**

### **Medical & dental expenses:**

All cost incurred including insurance premiums, eye surgery, miles driven, parking & lodging.

Capital Expenses amounts you pay for special equipment installed in a home, (Widening doorways at entrances, Adding handrails or grab bars anywhere, Air conditioner necessary for Allergies, ramps, etc.) if you have any large medical cost included them. We will sort them out to see if they can be used.

### **Taxes:**

State or city income taxes withheld

State income taxes paid on estimates in calendar year

Federal income taxes paid this tax year for last year

Real estate taxes less special assessments

Property tax refunds

Special assessment interest portion only

Personal property taxes (auto license tabs etc.)

State sales tax paid

### **Casualty Loss:**

Auto accident, fire theft, storm, etc. and insurance received

### **Interest Paid:**

Mortgage interests keep forms 1098

Lone points

Contract for deeds, you must have the name / address / SSN of the recipient

Investment interest paid

Student Loan Interest (an adjustment to income)

### **Contributions: As of 2007 you need a receipt for all donations (including the little red kettles) no exceptions.**

Cash

Churches or Synagogues, united campaigns include payroll deductions, boy and girl scouts, vets, Goodwill, Salvation Army, American Red Cross, etc. You will need a receipt for any one day single donations over \$250.00 (2006 is the last year for this).

Noncash:

Keep lists of items given to charities. List fair market value of each items given. If over \$500.00 provide documentation

### **Miscellaneous:**

Unreimbursed employee business expenses, union dues, tools and supplies special uniforms and safety equipment professional dues and subscriptions, job-related education.

Job-seeking expenses in your same field. (Travel, food, lodging, employment agency fees, resume, etc.)

Tax prep, financial planning/consultation fees. Successful job placement is not necessary.

### **Real estate:**

If you sold, acquired or refinanced bring or send copies of your closing statement.

Did you contribute to an IRA, Roth IRA or self-employed retirement plan? Include any documents or statements.

Did you incur educational expenses on behalf of yourself, your spouse or dependents? Send along information on type and cost.

### **Tax Credits to Consider:**

Dependent care, higher education, adoption, etc.

If you have any other things you would like us to look at to consider for your taxes please send them along with a note or call and check with us to see if you are going to need them.

As always we greatly appreciate your business and your referrals. We can not do it with out your support.

Thank You for using  
CPA Margaret M Benson LLC

If you need help understanding what you need or any questions please give us a call at 651 405 8337 or E-mail us at [peggy@mmbllc.com](mailto:peggy@mmbllc.com) we want to make this as easy as possible for you. Thank you

