

NAME _____

YEAR 2009

CHANGES: ADDRESS; PHONE; WORK PHONE; DEPENDENTS; OCCUPATION; FILING STATUS;
 CELL PHONE #
 NEW DEPENDENTS NAME, BIRTHDATE, SOCIAL SECURITY NUMBER

STATE REFUND		TAX PREPARATION FEE, JOB SEEK	
ALIMONY RECEIVED		TOOLS, SUPPLIES, PROF DUES,	
UNEMPLOYMENT ATTACH 1099		SAFETY EQUIP	
SOCIAL SECURITY ATTACH 1099		INVESTMENT EXPENSE	
SOCIAL SECURITY--SPOUSE 1099		SAFETY DEPOSIT BOX	
OTHER INCOME			
SELF EMP HEALTH INSURANCE			
ALIMONY PAID		INTEREST INCOME---ATTACH 1099	
PENSION DISTRIBUTION ATTACH 1099			
PENSION DISTRIBUTION SPOUSE--1099			
IRA CONTRIBUTION		CHASE BANK	
IRA CONTRIBUTION--SPOUSE		KEY BANK	
KEOGH/SEP		WELLS FARGO	
MEDICAL COSTS:		ZIONS BANK	
DOCTORS		_____ CREDIT UNION	
HOSPITAL		_____ CREDIT UNION	
Rx			
GLASSES			
TRAVEL			
HEALTH INSURANCE			
DDS			
REAL ESTATE TAX--RESIDENCE		UNIFORM REAL ESTATE CNTRCT	
REAL ESTATE TAX--CONDO, CABIN ETC.		TREASURY BONDS	
PERSONAL PROPERTY TAX-BOAT ETC.		TREASURY BILLS	
INTEREST**HOME MTG		NON TAX INTEREST	
SECOND MORTGAGE		DIVIDENDS---ATTACH 1099'S	
POINTS			
INVESTMENT INTEREST EXPENSE		TUITION PAID-FRSHMN SOPH JR. SR.	
CONTRIBUTIONS:		STUDENT LOAN INTEREST	
CHURCH			
BOY/GIRL SCOUTS		STOCK SOLD--INCLUDE 1099 AND	
UNITED WAY		ACQUISITION DATE AND COST	
CHARITABLE MILES _____			
OTHER:			
NON-CASH CONTRIBUTIONS:			
D.I./ DAV/ VFW/ HOMELESS			
CLOTHES/ APPL/ FURN/ PWR TOOLS/		DEPENDENT CARE COSTS	
EQPMNT/ HSHLD ITEMS			
UNION DUES			
UNIFORMS			
TRADE SUBSCRIPTIONS			