

Income Tax Information 2007

Names _____
Address _____
City, State & Zip _____
Phone: _____
E-mail: _____

Return to:

Jody L. Goode, CPA
512 1/2 East Grand Avenue
Suite 201
Des Moines, Iowa 50309
E-mail: Jody@JodyGoodeCPA.com
Phone: 515-288-8463

Please check all that apply and include supporting documents.

- | | |
|--|--|
| <input type="checkbox"/> Notice of any changes in marital status, residence, employment or profession and dependents | <input type="checkbox"/> A summary of rental income & expense records for rental properties including any forms 1099 received |
| <input type="checkbox"/> Social Security numbers and birthdates for yourself, your spouse and any dependents | <input type="checkbox"/> Amount of any federal, state or local taxes paid including the balance due for the prior year and any estimated tax payments made. |
| <input type="checkbox"/> A copy of last year's federal and state tax returns and the amount paid for preparing the tax return (New clients only) | <input type="checkbox"/> Records for home mortgage interest, real estate and personal property tax (includes auto registration fee) Please enclose and forms 1098 received |
| <input type="checkbox"/> All forms W-2 | <input type="checkbox"/> Records of any contributions you made to IRAs or other retirement plans not included on form W-2. |
| <input type="checkbox"/> Records of other income (tax refunds, jury duty, gambling, hobby, alimony, etc.) and related expenses | <input type="checkbox"/> A summary of amounts paid for education for yourself and any dependents and forms 1099-T, tuition statements received. |
| <input type="checkbox"/> A summary of business income & expense records for your sole proprietorship or single member LLC. | <input type="checkbox"/> A summary of employment-related expenses (dues, travel, publications, tools, uniform cost and cleaning, etc.) |
| <input type="checkbox"/> Records for all investment related income including any forms 1099 and schedule K-1 | <input type="checkbox"/> A summary of amounts paid for health care insurance and to doctors, dentists, and hospitals, etc. |
| <input type="checkbox"/> Purchase date and your total investment in any stocks or other property you sold | <input type="checkbox"/> A summary of job search expenses and unemployment income, (if applicable) |
| <input type="checkbox"/> Expenses related to your investments including portfolio deductions for fees and investment interest | <input type="checkbox"/> Amounts donated to houses of worship, schools, and other charitable organizations (Note for contributions of more than \$250, a statement from the charitable organization is required) |
| <input type="checkbox"/> Copies of any notices or other correspondence received from taxing authorities including mailing labels if any | <input type="checkbox"/> Records of non-cash charitable contributions including the number of miles driven for charitable purposes. (Appraisal for non-cash contributions of more than \$5,000 is required) |