









**IRA, PENSION, AND ANNUITIES** (Please enclose all copies of 2009 Form 1099-R)

**T = Taxpayer S = Spouse**

		2009					2008
T S	Payer's Name	Check if IRA	Box 1	Box 4	Amount rolled over into:		Gross distribution
			Gross distribution	Federal income tax withheld	Regular IRA	Roth IRA	

Total IRA basis for 2008 and prior years \_\_\_\_\_ **Taxpayer** \_\_\_\_\_ **Spouse**  
 Value of all traditional IRA's as of December 31, 2009 \_\_\_\_\_

**ANNUITIES AND PENSIONS BY THE RAILROAD RETIREMENT BOARD** (Please enclose all copies of 2009 Form RRB-1099-R)

**T = Taxpayer S = Spouse**

		2009		2008
T S	Payer's Name	Box 7	Box 9	Total gross paid
		Total gross paid	Federal income tax withheld	

**PAYMENTS FROM QUALIFIED EDUCATION PROGRAMS** (Please enclose all copies of 2009 Form 1099-Q)

**T = Taxpayer S = Spouse**

		2009			2008
T S	Payer's Name	Box 1	Box 5		Gross distributions
		Gross distributions	Private	State	

**PARTNERSHIPS, S CORPORATIONS, ESTATES AND TRUSTS** (Please enclose all copies of 2009 Schedule K-1)

Schedule K-1 (1065) Partnerships:			
Partnership's name	ID Number	Partnership's name	ID Number
Schedule K-1 (1120S) S Corporations:			
Corporation's name	ID Number	Corporation's name	ID Number
Schedule K-1 (1041) Estates or Trusts:			
Name of Trust or Estate	ID Number	Name of Trust or Estate	ID Number

**BUSINESS INCOME AND EXPENSES**

Indicate the owner of this business:  Taxpayer  Spouse  Joint

Business Name: \_\_\_\_\_

Business product or service: \_\_\_\_\_

Business Address: \_\_\_\_\_

City, State, and Zip Code: \_\_\_\_\_

Did you start or acquire this business during 2009?  Yes  No

Accounting Method:  Cash  Accrual  Other (describe) \_\_\_\_\_

Method used to value inventory:  Cost  Lower of cost or market  Other (describe) \_\_\_\_\_

Income and Cost of Goods Sold	2009 Amount	2008 Amount
Gross receipts or sales . . . . .		
Returns and allowances . . . . .		
Other income (enclose description) . . . . .		
Inventory at beginning of year . . . . .		
Purchases less cost of items withdrawn for personal use . . . . .		
Cost of labor . . . . .		
Materials and supplies . . . . .		
Other costs . . . . .		
Inventory at end of year . . . . .		

Expenses	2009 Amount	2008 Amount		2009 Amount	2008 Amount
Advertising . . . . .			Taxes and licenses . . . . .		
Commissions and fees . . . . .			Travel . . . . .		
Contract labor . . . . .			Meals and entertainment . . . . .		
Depletion . . . . .			Utilities . . . . .		
Employee benefits . . . . .			Wages . . . . .		
Insurance (other than health) . . . . .			Other: _____		
Mortgage interest . . . . .			_____		
Other interest . . . . .			_____		
Legal and professional fees . . . . .			_____		
Office expenses . . . . .			_____		
Pension and profit sharing . . . . .			_____		
Rent - Vehicle, machinery . . . . .			_____		
Rent - Other . . . . .			_____		
Repairs and maintenance . . . . .			_____		
Supplies . . . . .			_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2009**  
(New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales Price

**Business Use of Home**

Area used exclusively for business \_\_\_\_\_ Total area of home \_\_\_\_\_

Was the home used as a day care facility?  Yes  No Date home placed in service \_\_\_\_\_

Casualty losses \_\_\_\_\_ Insurance \_\_\_\_\_ FMV of home \_\_\_\_\_

Mortgage interest \_\_\_\_\_ Repairs and maintenance \_\_\_\_\_ Value of land \_\_\_\_\_

Real estate taxes paid \_\_\_\_\_ Utilities and other expenses \_\_\_\_\_

**FARM INCOME AND EXPENSES**

Indicate the owner of this farm:  Taxpayer  Spouse  Joint  
 Principal product \_\_\_\_\_  
 Accounting Method:  Cash  Accrual  
 Did you materially participate in the operation of this farm during 2009?  Yes  No

Income	2009 Amount	2008 Amount
Sales of livestock and other items bought for resale . . . . .		
Cost of livestock and other items bought for resale . . . . .		
Sales of livestock, produce, grains, and other products you raised . . . . .		
Cooperative distributions . . . . .		
Agricultural program payments . . . . .		
Commodity Credit Corporation (CCC) loans reported under election . . . . .		
Commodity Credit Corporation (CCC) loans forfeited . . . . .		
Crop insurance proceeds and disaster payments received in 2009 . . . . .		
Custom hire . . . . .		
Other income . . . . .		
Inventory of livestock, produce, etc.. at beginning of year (Accrual method only) .		
Cost of livestock, produce, etc.. purchased during year (Accrual method only) . . .		
Inventory of livestock, produce, etc.. at end of year (Accrual method only) . . . . .		

Expenses	2009 Amount	2008 Amount		2009 Amount	2008 Amount
Chemicals . . . . .			Repairs and maintenance .		
Conservation . . . . .			Seeds and plants purchased		
Custom hire . . . . .			Storage and warehousing .		
Employee benefits . . . . .			Supplies purchased . . . . .		
Feed purchased . . . . .			Taxes . . . . .		
Fertilizers and lime . . . . .			Utilities . . . . .		
Freight and trucking . . . . .			Veterinary and breeding . .		
Gasoline, fuel, and oil . . . . .			Other _____		
Insurance . . . . .			_____		
Mortgage interest . . . . .			_____		
Other interest . . . . .			_____		
Labor hired . . . . .			_____		
Pension and profit-sharing . .			_____		
Vehicles and machinery rent			_____		
Other rentals . . . . .			_____		

**Vehicle Information**  
 Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_  
 Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_  
 Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2009**  
 (New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales price

**RENTAL AND ROYALTY INCOME AND EXPENSES**

Indicate the owner of this property:  Taxpayer  Spouse  Joint

Description of property \_\_\_\_\_  
 Location of property \_\_\_\_\_

Did you or your family use this property during the tax year for personal purposes for more than the greater of: (a) 14 days, or (b) 10% of the total days rented at fair market value?  Yes  No

Did you meet the Active Participation requirements for this property?  
 (To meet these requirements, you must have participated in making management decisions or arranged for others to provide services in a significant and bona fide sense. Such management decisions include approving new tenants, deciding on rental terms, approving repair expenditures, or other similar decisions)  Yes  No

Was this property fully disposed of during 2009?  Yes  No

Income	2009 Amount	2008 Amount
Rents received . . . . .		
Royalties received . . . . .		

Expenses	2009 Amount	2008 Amount
Advertising . . . . .		
Cleaning and maintenance. . . . .		
Commissions . . . . .		
Insurance . . . . .		
Legal and other professional fees . . . . .		
Management fees . . . . .		
Mortgage interest paid to banks. . . . .		
Other interest. . . . .		
Repairs . . . . .		
Supplies . . . . .		
Taxes . . . . .		
Utilities . . . . .		
Other _____		
_____		
_____		
_____		
_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

Travel expenses \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2009**  
 (New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales price

**FARM RENTAL INCOME AND EXPENSES**

Indicate the owner of this farm rental:  Taxpayer  Spouse  Joint

Property description: \_\_\_\_\_

Did you actively participate in the operation of this farm rental during 2009?  Yes  No

Income	2009 Amount	2008 Amount
Income from the production of livestock, produce, grains, and other crops . . . . .		
Total cooperative distributions . . . . .		
Agricultural program payments . . . . .		
Commodity Credit Corporation (CCC) loans reported under election . . . . .		
Commodity Credit Corporation (CCC) loans forfeited. . . . .		
Crop insurance proceeds and federal crop disaster payments received in 2009 . . . . .		
Other income . . . . .		

Expenses	2009 Amount	2008 Amount		2009 Amount	2008 Amount
Chemicals. . . . .			Repairs and maintenance . . . . .		
Conservation . . . . .			Seeds and plants purchased . . . . .		
Custom hire. . . . .			Storage and warehousing . . . . .		
Employee benefits. . . . .			Supplies purchased . . . . .		
Feed purchased . . . . .			Taxes . . . . .		
Fertilizers and lime . . . . .			Utilities. . . . .		
Freight and trucking . . . . .			Veterinary and breeding . . . . .		
Gasoline, fuel, and oil. . . . .			Other _____		
Insurance . . . . .			_____		
Mortgage interest . . . . .			_____		
Other interest. . . . .			_____		
Labor hired . . . . .			_____		
Pension and profit-sharing . . . . .			_____		
Vehicles and machinery rent . . . . .			_____		
Other rentals . . . . .			_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2009**  
(New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales price





**ITEMIZED DEDUCTIONS (continued)**

2009 Amount	2008 Amount
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**Casualty and Theft Losses**

Casualty and theft losses (enclose supporting documentation with description of the casualty, description of the property, date acquired, cost of property, insurance reimbursements, and the fair market value before and after the casualty) . . . . .

**Miscellaneous Deductions**

**Unreimbursed Employee Business Expenses**      **T = Taxpayer   S = Spouse**

**Vehicle Information    T or S**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_  
 Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_  
 Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_  
 Travel expenses \_\_\_\_\_

**Vehicle Information    T or S**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_  
 Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_  
 Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_  
 Travel expenses \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2009**

(New clients, enclose detailed listing of all depreciable assets.)

T	S	Asset description	Date acquired	Purchase price	Date sold	Sales price

**Business Use of Home    T or S**

Area used exclusively for business \_\_\_\_\_ Total area of home \_\_\_\_\_ Date home placed in service \_\_\_\_\_  
 Casualty losses \_\_\_\_\_ Insurance \_\_\_\_\_ FMV of home \_\_\_\_\_  
 Mortgage interest \_\_\_\_\_ Repairs and maintenance \_\_\_\_\_ Value of land \_\_\_\_\_  
 Real estate taxes paid \_\_\_\_\_ Utilities and other expenses \_\_\_\_\_

2009 Amount	2008 Amount
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Unreimbursed employee business expenses (such as union dues, small tools, travel, etc) . . . . .  
 Tax preparation fees . . . . .  
 Other miscellaneous expenses (such items include safe deposit box rental, certain appraisal fees, expenses related to investment income, etc...enclose supporting documentation) . . . . .

**Other Miscellaneous Deductions**

Other miscellaneous deductions (such items include gambling losses, estate tax deduction, amortization of bond premium, etc... enclose supporting documentation) . . . . .

