VIMLAN TAX SERVICES, LLC.

NAVIGATING YOUR FINANCIAL SUCCESS

2009 Tax Questionnaire

Reset Form

Print Form

VIMLAN TAX

Full Name as on SSN Card: SSN #:

Spouse Name on SSN Card or ITIN Letter: SSN or ITIN #:

Street Address:

City: State/Province: ZIP/PIN Code:

Cell #: Personal Email Address(es):

Bring all the following if applicable, and mark the appropriate checkbox. NA means not applicable: Yes No NA

1. W2s........ ☐ ☐ ☐
2. W2-Gs (for gambling winnings)........ ☐ ☐ ☐
3. 1099-Int (Interest Earnings from Bank and Cash Deposit Accounts)........ ☐ ☐ ☐
4. 1099-Div (Dividend Earnings from Stock, Mutual Fund Accounts)........ ☐ ☐ ☐
5. 1099-B (Brokerage Statement for Sale of Mutual Funds & Stocks; **GAINSKEEPER IS HELPFUL, IF YOU HAVE IT**... ☐ ☐ ☐
6. 1099-R (Retirement account, e.g. IRA or 401K transfer/rollover/liquidation)........ ☐ ☐ ☐
7. 1099-M (Any self employed income you may have earned)........ ☐ ☐ ☐
8. SSA-1099 (only if you are collecting Social Security Retiree Benefits)........ ☐ ☐ ☐
9. 1099-G (State Refund from last year, one for each state OR Unemployment Earnings)........ ☐ ☐ ☐
10. 1098-INT (mortgage interest)........ ☐ ☐ ☐
11. 1098-E (student loan interest)........ ☐ ☐ ☐
12. 1098-T (Student tuition statement)........ ☐ ☐ ☐
13. Property tax statements (for all real estate you own - NEED County PIN Numbers)........ ☐ ☐ ☐
14. HUD-1 Closing Settlement Statements (for any property you bought in 2009, or if primary home, in 2010).......... ☐ ☐ ☐

Also, please answer following questions, and give appropriate amounts. NA means not applicable:

15. Timeline of states & counties you **LIVED** in during 2009:

16. Timeline & states & counties you **WORKED** during 2009:

Yes No NA

17. Did you move more than 50 miles due to a change in employment?........ ☐ ☐ ☐

A. If yes, provide unreimbursed cost amount (you must have proof in forms of receipts)

B. How many total miles did you move from your old home, to your new home? No proof needed.

18. How much did you spend on books and tuition? Sometimes **1098-T** statement can be wrong. *Also deductible on Oregon Return, if you are filing Oregon state return.*

A. Out of Pocket Tuition Cost: B. Out of Pocket Books Cost (Must have Proof):

19. Did you buy a **new** car between the dates of **February 17th, 2009, and Dec. 31st, 2009?** If yes, **BRING SALES INVOICE.** ☐ ☐ ☐

Give model & make of new car. If hybrid, please state so:

20. Have you contributed or will you be contributing (deadline 04/15/2010) to your, and/or your wife's ROTH/ or regular IRAs? ☐ ☐ ☐

Your Account: Amount: Wife's Account: Amount:

21. Did you earn any interest income in any foreign bank accounts, e.g. in Canada, India, UK. ☐ ☐ ☐

A. How much did you make? B. Are your foreign deposits accounts $10,000 or more? If yes, fill the TD 90-22.1; available on our website or we can provide you with this form. ☐ ☐ ☐

22. Are your out of pocket medical expenses are very high? Then provide a separate sheet categorizing it y doctors, medicines, & hospital bills ☐ ☐ ☐

23. Have you contributed or will you be contributing to your Health Savings Account (HSA) in 2009. If doing this by 04/15/10, please state. ☐ ☐ ☐
REMEMBER, IF YOU TOOK OUT MONEY FROM YOUR HSA DURING 2009, WE NEED THE DISTRIBUTION FORM FROM YOUR HSA PROVIDER/BANK.

Single or Family Contribution: Separate HSA for Spouse, if applicable

24. Did you incur any costs for your job, for which you were not reimbursed? If so, please fill out page 3 here, or provide a breakdown of all expenses for which you were not reimbursed. E.g., airfares, hotels, tools, supplies, cell phone, etc. *Deductible on PA state return, even if you do not itemize on federal return.* ☐ ☐ ☐

25. If **you both worked** last year, did you use a babysitter/daycare provider? If yes, please provide the following info on your provider.

Name of Provider: SSN/TAX ID #:

Street Address:

City: State Alabama ZIP Code:

26. **Did you make any charity donation to an established US-Based Charity and have proof of it?** If yes, please provide proof. Cash means check, credit card, cash. Haiti Earthquake deductions are allowed for 2009 if you make a deduction after 01/11/2010 and before 03/1/2010. ***Also deductible on Colorado return, if you are filing Colorado state return.***

If NonCash Item, Please Specify: and/or Cash donation:

Estimate Value of NonCash Item

27. Did you own any rental or investment property you own, other than your home for which you have expenses and income? If yes, please a separate sheet of all expenses and income on the property. If you just bought the property in 2009, do bring the HUD-1 statements.

28. **Please list your dependents.** If they do not have socials or ITINS and need to apply for them, please state so from the drop-down box. You can claim dependent parents/relatives if they are visiting you from another country under extenuating circumstances. Please call for that info. Please **SEE PAGE 4 HERE FOR DOCUMENTATION** for proper documentation we need.

Name of Dependent	DOB mm/dd/yyyy	SSN# or ITIN#	Status (if no ITIN# or SSN#)

State Section:

29. **Massachusetts filers**, please provide the following amounts spent by you last year:
*Also, Please **provide your 1099-HC** from your employer or Health Insurance Company if you want to avoid the penalty from Massachusetts for not having health insurance proof.*
If you cannot provide your **1099-HC document,** then fill out following grid:

a) Medical/Dental

b) Fast Lane Toll

c) MBTA Transit

Taxpayer or Spouse (T/S)	Name of Insurance Company	Federal ID #	Subscriber #(usually on card)
Taxpayer (you)			
Taxpayer (you)			

30. **Illinois filers**, did you have any children in KG-12 last year and you spent more than $250 TOTAL in schooling expenses? (example: tuition, books, lab fees, instruments, supplies, equipment, etc.) KUMON and tutoring program costs NOT allowed. *Provide a separate sheet if necessary.*

Name of Child	SSN# or ITIN#	(K-12)-Last Yr	School Name	School City	Total Cost

31. **For all renters**, please give last year's rent expense here. (CA, IN, MA, MI, MN, MO, NJ, PA, & WI have rental deductions/ credits). PA & MO are for those 65 & older, widows & widowers 50 & older, and those disabled 18 & older.

Rent Paid Last Year

32. Was heating/gas expense included in rent you paid? If yes, please provide amount here: Yes ☐ No ☐

Heat Included if any

Months Rented

33. **Minnesota Renters**, please provide your **M-1PR document.**

34. **Indiana Renters,** give Landlord Name & Address, & your rental address if different from your mailing address &/or Landlord address. Attach additional sheets if more than one Indiana residence.

Landlord Name	Landlord (address, city, state, zip)	Your Rental (Address, city, state, zip)

35. **New Jersey Renters,** provide your a) roommates names, b)SSN #s, & c)rental amounts they paid. ***Provide this on a separate sheet of paper.***

36. **New Mexico taxpayers,** your medical expense last year:

37. **Connecticut taxpayers,** your vehicle taxes:

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Leave page blank if you do not have any job expenses.

PRINT FORM

RESET FORM

UNREIMBURSED JOB EXPENSES	Taxpayer	Spouse	Total
Transportation/Travel Expenseparking			
-- Parking Fees:			$0
-- Roadway Tolls:			$0
-- Lodging:			$0
-- Car Rental Charges:			$0
-- Airfare:			$0
-- Laundry Charges (only while away):			$0
-- Other Miscellaneous Travel (Please specify, if possible):			$0
Mileage you drive while on project (*NOT* to and from job, but to/from client and project sites):			$0
Year of Car:			
Make and Model of Car:			
Date you Bought Car:			
Did you take vehicle expenses last year on your tax return also? If yes, provide last year's return:	Please Select	Please Select	
Meals (lunch, dinner) etc. during time away from home:			$0
Supplies & Tools (-- e.g., laptop, software, job training education, uniform, boots, tools, etc.)			
-- Laptop Purchase Cost:			$0
-- Job Training (Course Cost, e.g., SAP/Peoplesoft training and books etc.):			$0
-- Uniform Cost:			$0
-- Tools Cost:			$0
-- Other Miscellaneous (Please list here) Costs:			$0
Utilities expense (cell phone, home phone, and internet charges as they relate to work)			
-- Mobile/Cell Phone Charges:			$0
-- Home Telephone Charges:			$0
-- Internet Usage:			$0
-- Other Miscellaneous (Please list here) Costs:			$0
Attorney fees (tax advice portion only!) and Tax Accountant/Filing Charges :			$0
Office Expense (rent for expense, office furniture):			$0
	Please Select	Please Select	
Insurance (Life, Health, or Car). Please specify:			$0
Repairs and maintenance for car used in work, for work-related machinery, etc:			$0
Postage:			$0
Contract Labor (anyone else you hired, gave money to):			$0
Advertising Expense:			$0
Immigration Expense (Visa Transfer Fees, Lawyer, Stamping, Travel for Stamping, Greencard):			$0
Stamping is only allowed if your employer requires you to get it in order to remain employed.			
			$0

Disregard this page or leave this page blank if you do not wish to apply for an individual tax identification number for any of your dependents.

ITIN (Individual Taxpayer Identification Number) Application Instructions

Make copies of the following, and have them notarized. Repeat the procedure for all applying for ITINs.

1) Photo and address pages of the passport.
2) I-94 (Departure Record), which is usually stapled inside the passport.
- **If this is not available, then make sure to make a copy of the passport page where the Department of Homeland Security has stamped the entry date.**

3) Valid US Entry Visa.
4) Have documents notarized by a US Notary. Notary must indicate "This is a true and certified copy of the original."

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