



**2009**

**INCOME TAX ORGANIZER**

For

**Non - Travel Client**

Provide Your Address

,

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<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Client Information</b>	<b>1</b>
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**Tax Return Appointment**

Date:  
 Time:  
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2009 tax return. Please add, change, or delete information as appropriate.

**CLIENT INFORMATION**

Filing Status	Filing status (table).....	1	<p><b>Filing Status</b></p> <p>1 = Single                  2 = Married filing joint                  3 = Married filing separate                  4 = Head of household                  5 = Qualifying widow(er)</p>
	1=married filing separate and lived with spouse.....		
	Year spouse died, if qualifying widow(er) (2007 or 2008).....		
Taxpayer	First name and initial.....	Non -	
	Last name.....	Travel Client	
	Title/suffix.....		
	Social security number.....		
	Occupation.....		
	Date of birth (m/d/y).....		
	Date of death (m/d/y).....		
1=blind.....			
Spouse	First name and initial.....		
	Last name.....		
	Title/suffix.....		
	Social security number.....		
	Occupation.....		
	Date of birth (m/d/y).....		
	Date of death (m/d/y).....		
1=blind.....			
Address	In care of.....		
	Street address.....	Provide Your Address	
	Apartment number.....		
	City.....		
	State.....		
Foreign Address	Region.....		
	Postal code.....		
	Country.....		

2009

1040

US

Client Information (continued)

1 p2

Please add, change or delete information for 2009.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone.....		<b>Daytime Phone</b>  1 = Work 2 = Home 3 = Mobile
	Work phone.....		
	Work extension.....		
	Daytime phone (table).....	1	
	Mobile phone.....		
	Pager number.....		
	Fax number.....		
	E-mail address.....		
Spouse Contact Information	Home phone.....		
	Work phone.....		
	Work extension.....		
	Daytime phone (table).....		
	Mobile phone.....		
	Pager number.....		
	Fax number.....		
	E-mail address.....		

1 p2

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Dependents</b>	<b>2</b>
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Please add, change or delete information for 2009.

**DEPENDENTS**

	Dependent	Dependent	
First name .....			<b>Type of Dependent</b> 1 = Child living w/taxpayer 2 = Child not living w/taxpayer 3 = Dependent other than child 4 = Head of household only, not a dependent 5 = Earned income credit only, not a dependent
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
			<b>Earned Income Credit</b> 1 = When applicable (default) 2 = Student age 19 to 23 3 = Disabled 4 = Force 5 = Suppress
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			

2009

1040

US

**Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2009, please check the appropriate box and provide additional information if necessary.

**PERSONAL INFORMATION**

Yes No

- Did your marital status change during the year?
- Did your address change during the year?
- Could you be claimed as a dependent on another person's tax return for 2009?

**DEPENDENTS**

- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2009?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2009, with with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?

**INCOME**

- Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
- Did you receive any disability income?
- Did you have any foreign income or pay any foreign taxes?

**PURCHASES, SALES AND DEBT**

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you buy or sell any stocks, bonds or other investment property in 2009?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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Did you add energy efficient property to your home in 2009? Energy efficient property specifically refers to solar energy, solar water heating, fuel cell, small wind energy or a geothermal heat pump.

Did you purchase a new hybrid vehicle in 2009?

Did you have any debts cancelled or forgiven?

Did you buy a main home before December 1, 2009 and you (and your spouse) did not own any other home during the 3-year period ending on the date of purchase?

**RETIREMENT PLANS**

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Circle appropriate answer.

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

**EDUCATION**

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

**ITEMIZED DEDUCTIONS**

Did you incur a loss because of damaged or stolen property?

Did you use your car on the job (other than to and from work)?

**ESTIMATED TAXES**

Did you apply an overpayment of 2008 taxes to your 2009 estimated tax (instead of being refunded)?

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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If you have an overpayment of 2009 taxes, do you want the excess applied to your 2010 estimated tax (instead of being refunded)?

Do you expect your 2010 taxable income and withholdings to be different from 2009?

**MISCELLANEOUS**

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

Was your home rented out or used for business?

Did you make contributions to a health savings account (HSA) this year?

Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

Did you incur moving expenses due to a change of employment?

Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust?

Were you or was any of your property located in a federally declared disaster area, such as those affected by the Midwest flooding or Hurricanes Gustav or Ike?

Did you receive a \$250 economic recovery payment in 2009 that was made to social security recipients, railroad retirement recipients and certain veterans?

Did your spouse receive a \$250 economic recovery payment in 2009 that was made to social security recipients, railroad retirement recipients and certain veterans?

2009

1040

US

**Miscellaneous Questions**

- Did you receive a pension or annuity in 2009 for services performed as an employee of the U.S., state or local government from work not covered by social security?
- Did your spouse receive a pension or annuity in 2009 for services performed as an employee of the U.S., state or local government from work not covered by social security?
- Did you elect to receive COBRA continuation health coverage (35% of premium) between February 17, 2009 and December 31, 2009 as a result of an involuntary termination?
- Did your spouse elect to receive COBRA continuation health coverage (35% of premium) between February 17, 2009 and December 31, 2009 as a result of an involuntary termination?

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Direct Deposit &amp; Estimates (Form 1040 ES)</b>	<b>3, 6</b>
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Please enter all pertinent 2009 information.

**ECONOMIC RECOVERY PAYMENT / DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)**

NOTE: You may have received an economic recovery payment if you received social security benefits, supplemental security benefits, railroad retirement benefits, or veterans disability compensation or pension benefits.

1=taxpayer received \$250 economic recovery payment.....		
1=spouse received \$250 economic recovery payment.....		
1=taxpayer received government pension not covered by social security....		
1=spouse received government pension not covered by social security.....		
1=direct deposit of federal tax refund into bank account.....		
1=electronic payment of balance due.....		
1=electronic payment of estimated tax.....		

**BANK INFORMATION**

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

**2009 ESTIMATED TAX / 1040-ES (6)**

**Federal**

	Amount Paid	Date Paid	TS	2009 Voucher Amount
Overpayment applied from 2008.....				
1st quarter payment (due 4/15/09).....				
2nd quarter payment (due 6/15/09).....				
3rd quarter payment (due 9/15/09).....				
4th quarter payment (due 1/15/10).....				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/15/10).....				

**State**

	Amount Paid	Date Paid	TS	2009 Voucher Amount
Overpayment applied from 2008.....				
1st quarter payment (due 4/15/09).....				
2nd quarter payment (due 6/15/09).....				
3rd quarter payment (due 9/15/09).....				
4th quarter payment (due 1/15/10).....				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/15/10).....				

**1 Type of Account**

1 = Savings  
2 = Checking

**2 Type of Investment**

1 = Checking or savings (default)	6 = Coverdell savings account (ESA)
2 = Taxpayer's IRA (next year limits)	7 = Other
3 = Spouse's IRA (next year limits)	8 = Taxpayer's IRA (current year limits)
4 = Health savings account (HSA)	9 = Spouse's IRA (current year limits)
5 = Archer MSA	10 = Series 1 treasury bonds

	<b>Hash Total</b>	<b>3, 6</b>
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2009	1040	US	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1
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Please enter all pertinent 2009 information.

**APPLICATION OF 2009 OVERPAYMENT (7.1)**

If you have an overpayment of 2009 taxes, do you want the excess refunded?  or applied to 2010 estimate?...

Other (please explain): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2010 ESTIMATED TAX INFORMATION**

Do you expect your 2010 taxable income to be different from 2009? ..... Yes  No

If "yes" explain any differences in income, deductions, dependents, etc.: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you expect your 2010 withholding to be different from 2009? ..... Yes  No

If "yes" explain any differences: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

	Hash Total		7.1
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<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Wages, Pensions, Gambling Winnings</b>	<b>10, 13.1, 13.2</b>
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Please enter all pertinent 2009 amounts & attach all W-2, W-2G and 1099-R forms.  
Last year's amounts are provided for your reference.

**WAGES, SALARIES, TIPS (10)**

No.	Name of Employer (Box c)	1=retirement plan (Box 13) 1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld					2008 Wages
				Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	Local (Box 19)	
1	Send W-2 Forms								

**PENSIONS, IRA DISTRIBUTIONS (13.1)**

No.	Name of Payer	Distribution code #2 Distribution code #1 1=IRA/SEP/SIMPLE 1=spouse	Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld		Value of all IRAs at 12/31/09	2008 Distribution
					Federal (Box 4)	State (Box 10)		
					1	Send 1099-R Forms		

**GAMBLING WINNINGS (W-2G) (13.2)**

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld		2008 Winnings
				Federal (Box 2)	State (Box 14)	
1	Send W2-G Forms, If Any					

**GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)**

	<b>2009 Amount</b>	TS		<b>2008 Amount</b>
Total gambling losses .....				
Winnings not reported on Form W-2G .....				

**10, 13.1, 13.2**

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Interest &amp; Dividend Income</b>	<b>11, 12</b>
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Please enter all pertinent 2009 amounts & attach all 1099-INT, 1099-OID and 1099-DIV forms.  
Last year's amounts are provided for your reference.

**INTEREST INCOME (11)**

No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Interest Income			Tax-Exempt Interest		Early Withdrawal Penalty (Box 2)	2008 Interest
			Banks, S&Ls, C/Us, etc. (Box 1)	Seller- Financed Mtg. (Box 1)	U.S. Bonds, T-Bills (Box 3)	Total Municipal Bonds	In-state Municipal Bonds		
1	Send 1099-INT Forms								

**DIVIDEND INCOME (12)**

No.	Name of Payer	1=tp 2=sp	Dividend Income				Tax-Exempt Interest		Foreign Tax Paid (Box 6)	2008 Dividends
			Total Ordinary Dividends (Box 1a)	Qualified Dividends (Box 1b)	Total Capital Gain Distrib. (Box 2a)	U.S. Bonds (% or amt.)	Total Municipal Bonds	In-state Muni-bonds (% or amt.)		
1	Send 1099-DIV Forms									

2009

1040

US

State & Local Tax Refunds / Unemployment Compensation

14.2

Please add, change or delete 2009 information as appropriate.  
Be sure to attach all 1099-G forms.

**STATE AND LOCAL TAX REFUNDS /  
UNEMPLOYMENT COMPENSATION (Form 1099-G)**

2009 1099-G Amount

Send 1099-G Forms

No. <input type="text" value="1"/>	Name of payer .....		
	1=spouse .....		
	Unemployment compensation:		
	Total received (Box 1) .....		
	2009 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund .....		
	Tax year for box 2 if not 2008 (Box 3) .....		
	Federal income tax withheld (Box 4) .....		
	ATAA payments (Box 5)		
	Taxable grants:		
	Federal taxable amount (Box 6) .....		
	State taxable amount, if different .....		
	Farm amounts:		
	Agriculture payments (Box 7) .....		
1=agriculture payments are from conservation reserve program .....			
Market gain (Box 9) .....			
Number of farm .....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld .....			

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Unemployment compensation:		
	Total received (Box 1) .....		
	2009 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund .....		
	Tax year for box 2 if not 2008 (Box 3) .....		
	Federal income tax withheld (Box 4) .....		
	ATAA payments (Box 5)		
	Taxable grants:		
	Federal taxable amount (Box 6) .....		
	State taxable amount, if different .....		
	Farm amounts:		
	Agriculture payments (Box 7) .....		
1=agriculture payments are from conservation reserve program .....			
Market gain (Box 9) .....			
Number of farm .....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld .....			

14.2

2009

1040

US

Business Income (Schedule C)

No. 1

16

Please enter all pertinent 2009 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Table with 2 columns: Description (Principal business/profession, Principal business code, Business name, Business address, City, state, ZIP code, Employer identification number, Other accounting method) and Business Income and Exp.

Table with 2 columns: Accounting method, Inventory method, 1=change of inventory method, 1=spouse, 2=joint, 1=first Schedule C filed for this business, 1=W-2 earnings as statutory employee, 1=not subject to self-employment tax, 1=did not "materially participate", 1=personal services is not a material income producing factor, 1=investment, 1=minister's Schedule C, 1=single member limited liability company.

INCOME

Table with 3 columns: Description (Gross receipts or sales, Returns and allowances, Other income), 2009 Amount, 2008 Amount.

COST OF GOODS SOLD

Table with 3 columns: Description (Inventory at beginning of the year, Purchases, Cost of items for personal use, Cost of labor, Materials and supplies, Other costs, Inventory at end of the year), 2009 Amount, 2008 Amount.

2009

1040

US

Business Income (Schedule C) (cont.)

No. 1

16 p2

Please enter all pertinent 2009 amounts. Last year's amounts are provided for your reference.

EXPENSES

	2009 Amount	2008 Amount
Accounting .....		
Advertising .....		
Answering service .....		
Bad debts from sales or service .....		
Bank charges .....		
Car and truck expenses (not entered elsewhere) .....		
Commissions .....		
Contract labor .....		
Delivery and freight .....		
Dues and subscriptions .....		
Employee benefit programs .....		
Insurance (other than health) .....		
Mortgage interest (paid to banks, etc.) .....		
Other interest (not entered elsewhere) .....		
Janitorial .....		
Laundry and cleaning .....		
Legal and professional .....		
Miscellaneous .....		
Office expense .....		
Outside services .....		
Parking and tolls .....		
Pension and profit sharing plans - contributions .....		
Pension and profit sharing plans - admin. and education costs .....		
Postage .....		
Printing .....		
Rent - vehicles, machinery, & equipment (not entered elsewhere) .....		
Rent - other .....		
Repairs .....		
Security .....		
Supplies .....		
Taxes - real estate .....		
Taxes - payroll .....		
Taxes - sales tax included in gross receipts .....		
Taxes - other (not entered elsewhere) .....		
Telephone .....		
Tools .....		
Travel .....		
Total meals and entertainment in full (50%) .....		
Department of Transportation meals in full (80%) .....		
Uniforms .....		
Utilities .....		
Wages .....		

Other expenses:

_____		
_____		
_____		
_____		
_____		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

16 p2

<b>2009</b>	<b>1040</b>	<b>US</b>	<b>Capital Gains &amp; Losses (Schedule D)</b>	<b>17</b>
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**If you sold any stocks, bonds, or other investment property in 2009, please list the pertinent information for each sale below or provide a spreadsheet file with this information.  
Be sure to attach all 1099-B forms and brokerage statements.**

No.	Quantity (Box 5)	Description of Property (Box 7)	Date Acquired	Date Sold (Box 1a)	Sales Price (gross or net) (Box 2)	Cost or Basis	Expenses of Sale (if gross sales price entered)	Federal Income Tax Withheld (Box 4)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								

2009

1040

US

Itemized Deductions

25

Please enter all pertinent 2009 amounts and attach all 1098 forms. Last year's amounts are provided for your reference.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

Table with 3 columns: 2009 Amount, TS, 2008 Amount. Rows include Prescription medicines and drugs, Doctors, dentists and nurses, Hospitals and nursing homes, Insurance premiums not entered elsewhere, Long-term care premiums, Insurance reimbursement, Lodging and transportation, Out-of-pocket expenses, Medical miles driven, and Other medical and dental expenses.

TAXES PAID (State and local withholding and 2009 estimates are automatic.)

Table with 3 columns: 2009 Amount, TS, 2008 Amount. Rows include State income taxes (1/09 payment, 2008 extension, 2008 return, prior years), and City/local income taxes (1/09 payment, 2008 extension, 2008 return).

SALES AND USE TAXES PAID

Table with 3 columns: 2009 Amount, TS, 2008 Amount. Rows include State and local sales taxes, Use taxes paid on 2009 purchases, Use taxes paid with 2008 state return, and New passenger auto's, light trucks, motorcycles, and motor homes purchased 2/17/09 - 12/31/09 \*.

OTHER TAXES PAID

Table with 3 columns: 2009 Amount, TS, 2008 Amount. Rows include Real estate taxes (principal residence, property held for investment), Personal property taxes, Foreign income taxes, and Other taxes.

25

2009

1040

US

Itemized Deductions (continued)

25 p2

Please enter all pertinent 2009 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:

2009 Amount

TS

2008 Amount

Table with 3 columns: Description, 2009 Amount, 2008 Amount. Includes rows for home mortgage interest and points reported on Form 1098.

Home mortgage interest not reported on Form 1098:

Form for home mortgage interest not reported on Form 1098, including fields for payee's name, SSN, address, and amount paid.

Points not reported on Form 1098:

Table for points not reported on Form 1098 with 3 columns: Description, 2009 Amount, 2008 Amount.

Mortgage insurance premiums on post 12/31/06 contracts (Box 4) . . . .

Table for mortgage insurance premiums with 3 columns: Description, 2009 Amount, 2008 Amount.

Investment interest (interest on margin accounts):

Table for investment interest with 3 columns: Description, 2009 Amount, 2008 Amount.

Passive interest . . . . .

Table for passive interest with 3 columns: Description, 2009 Amount, 2008 Amount.

Certain home mortgage interest included above (6251) . . . . .

Table for certain home mortgage interest with 3 columns: Description, 2009 Amount, 2008 Amount.

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:

Table for cash contributions to churches, schools, hospitals, etc. with 3 columns: Description, 2009 Amount, 2008 Amount.

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Table for volunteer expenses and charitable miles with 3 columns: Description, 2009 Amount, 2008 Amount.

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

Table for cash contributions to veterans' organizations, etc. with 3 columns: Description, 2009 Amount, 2008 Amount.

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Table for volunteer expenses and charitable miles with 3 columns: Description, 2009 Amount, 2008 Amount.

25 p2

2009

1040

US

Itemized Deductions (continued)

25 p3

Please enter all pertinent 2009 amounts. Last year's amounts are provided for your reference.

**NONCASH CONTRIBUTIONS**

NOTE: Use Sheet 26 if total noncash contributions are over \$500. No deduction is allowed for contributions of clothing and household items that are not in *good* used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

50% limitation (see above):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

2009 Amount	TS	2008 Amount

30% limitation (see above):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


30% capital gain property (gifts of capital gain property to 50% limit orgs.):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


20% capital gain property (gifts of capital gain property to non-50% limit orgs.):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


**MISCELLANEOUS DEDUCTIONS** (subject to 2% AGI limit)

Union and professional dues.....

--	--	--

Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


Investment expense:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


Tax return preparation fee.....

Safe deposit box rental.....


Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_


25 p3



2009

1040

US

Itemized Deductions (continued)

25 p5

If either of the following conditions below apply to you, your home mortgage interest deduction may need to be limited and the input section provided below should be completed. If neither condition applies, enter home mortgage interest amounts on organizer sheet 25 p2.

- 1.Total home equity debt exceeded \$100,000 at any time during 2009 (\$50,000 if married filing separate). For this purpose, home equity debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used for purposes other than to buy, build, or improve your home. An example of this type of mortgage is a home equity loan use to pay off credit card bills, buy a car, or pay tuition.
- 2.Total home acquisition debt exceeded \$1,000,000 at any time during 2009 (\$500,000 if married filing separate). For this purpose, home acquisition debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used to buy, build, or improve your home.

NOTE: When completing the input section below, grandfather debt represents loans taken out prior to October 14, 1987.

Please enter all pertinent 2009 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.

	2009 Amount	TS	2008 Amount
Fair market value of the property on the date that the last debt was secured . . . . .			
Home acquisition and grandfather debt on the date that the last debt was secured. . . . .			

**LOAN INFORMATION**

Loan #1

Lender's name . . . . .			
Form (see table). . . . .			
Number of form. . . . .			
1=taxpayer, 2=spouse, blank=joint . . . . .			
Interest paid. . . . .			
Points paid. . . . .			
Total principal paid. . . . .			
Lump sum principal payment (if paid off). . . . .			
Months outstanding (if not 12). . . . .			
Home acquisition debt balance - beginning of year. . . . .			
Home acquisition debt borrowed in 2009. . . . .			
Home equity debt balance - beginning of year. . . . .			
Home equity debt borrowed in 2009. . . . .			
Grandfather debt balance - beginning of year . . . . .			

Loan #2

Lender's name . . . . .			
Form (see table). . . . .			
Number of form. . . . .			
1=taxpayer, 2=spouse, blank=joint . . . . .			
Interest paid. . . . .			
Points paid. . . . .			
Total principal paid. . . . .			
Lump sum principal payment (if paid off). . . . .			
Months outstanding (if not 12). . . . .			
Home acquisition debt balance - beginning of year. . . . .			
Home acquisition debt borrowed in 2009. . . . .			
Home equity debt balance - beginning of year. . . . .			
Home equity debt borrowed in 2009. . . . .			
Grandfather debt balance - beginning of year . . . . .			

**Form**  
1 = Schedule A (default)  
2 = Business use of home  
3 = Schedule E

25 p5

2009

1040

US

Noncash Contributions (Form 8283)

26

If your total noncash contributions are in excess of \$500 in 2009, please complete the information below for each donee using the following guidelines:

- \* If you contributed a motor vehicle, boat, or airplane with a claimed value of more than \$500, attach Form 1099-C or other written acknowledgement received from the donee organization.
- \* A deduction for contributions of clothing or other household items that are not in *good* used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than \$500 is claimed, if a qualified appraisal for the donated property is provided.

**DONATED PROPERTY INFORMATION**

No. <input type="text"/>	Vehicle	Name of charitable organization (donee) .....	
		Street address .....	
		City, state, ZIP code .....	
		1=spouse, 2=joint .....	
		Property description (other than vehicle) .....	
		Year (yyyy) .....	
		Make and model .....	
		Condition and mileage .....	
		Date of contribution (m/d/y) * .....	
		Date acquired by donor (m/y) * .....	
		How acquired by donor (Table 1 or describe) .....	
		Donor's cost or basis .....	
Fair market value .....			
Method used to determine FMV (Table 2 or describe) .....			
No. <input type="text"/>	Vehicle	Name of charitable organization (donee) .....	
		Street address .....	
		City, state, ZIP code .....	
		1=spouse, 2=joint .....	
		Property description (other than vehicle) .....	
		Year (yyyy) .....	
		Make and model .....	
		Condition and mileage .....	
		Date of contribution (m/d/y) * .....	
		Date acquired by donor (m/y) * .....	
		How acquired by donor (Table 1 or describe) .....	
		Donor's cost or basis .....	
Fair market value .....			
Method used to determine FMV (Table 2 or describe) .....			
No. <input type="text"/>	Vehicle	Name of charitable organization (donee) .....	
		Street address .....	
		City, state, ZIP code .....	
		1=spouse, 2=joint .....	
		Property description (other than vehicle) .....	
		Year (yyyy) .....	
		Make and model .....	
		Condition and mileage .....	
		Date of contribution (m/d/y) * .....	
		Date acquired by donor (m/y) * .....	
		How acquired by donor (Table 1 or describe) .....	
		Donor's cost or basis .....	
Fair market value .....			
Method used to determine FMV (Table 2 or describe) .....			

**1 How Property was Acquired**  
 1 = Purchase                      3 = Inheritance  
 2 = Gift                              4 = Exchange

**2 Method Used to Determine FMV**  
 1 = Appraisal                      3 = Catalog  
 2 = Thrift shop value              4 = Comparable sales

For other methods, see IRS Pub. 561.

26

