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To prepare your personal or business tax returns for 2008, we'll need the following:

2007 federal, state, and local returns. (If we did your returns last year, we have them on file.)

For personal returns (Form 1040), select what applies in your case:

Taxpayer and spouse social security numbers and birth dates
Dependents, with birth dates and social security numbers
W-2's - and if you received any unemployment compensation, the 1099-G
1099's for interest or dividends
1099's for sales of securities
1099-MISC's for income earned as an independent contractor or landlord
1099-R's for retirement income
K-1's from partnerships, LLCs, S-Corps or trusts
Year-end Social Security statements
Estimated tax payments (to federal, state or local governments)
Childcare provider – name, address and federal ID, totals per child
1098's for student loan interest or tuition payments
IRA contributions

Itemized deductions:

- Medical expenses, including payments for health or long-term care insurance
- State and local income taxes and property taxes paid in 2008
- Mortgage interest paid in 2008
- Charitable contributions that you can document
- Unreimbursed expenses that you incurred for your work or moving
- Expenses associated with investments

Business income taxes: This information goes on a Schedule C on your personal return if you're a sole proprietor, a Form 1065 for partnerships or most LLCs, and a Form 1120 or 1120S for corporations.

- Federal ID number
- Business name and address
- Type of business (what does it do?), and names and other data about owners
- Receipts and expenses; bring an income statement and balance sheet if available, or we can do the necessary bookkeeping.
- Fixed assets (building, if owned; equipment, furniture, company cars)
- Loans and payments for the year, with an amortization schedule if possible
- Rental income and expenses
- Farm income and expenses
- Taxes paid by the business during the year