

2009 DEDUCTIONS & CREDITS

MEDICAL EXPENSES

MEDICINE & DRUGS (Prescription Only) \$ _____
 MEDICAL INSURANCE PREMIUMS \$ _____
 DOCTORS, DENTISTS, NURSES \$ _____
 OTHER: Hearing Aid, Glasses, Etc. \$ _____
 LONG TERM CARE INSURANCE \$ _____
 MILEAGE TO DOCTORS, ETC. # _____

TAXES

REAL ESTATE TAXES (HOME) \$ _____
 MUST PROVIDE STATE TAXABLE VALUE OF HOME (MI) \$ _____
 OTHER PROPERTY TAXES (2nd Home - Cottage): _____ \$ _____
 _____ \$ _____
 AUTO LICENSE TABS \$ _____
 SALES TAX PAID State _____ \$ _____
 Major Purchase _____ \$ _____
 Major Purchase _____ \$ _____

INTEREST EXPENSE

HOME MORTGAGE INTEREST (1ST HOME) \$ _____
 HOME MORTGAGE INTEREST (2ND HOME) \$ _____
 L/C NAME: _____ \$ _____
 ADDRESS: _____
 SSN: _____
 HOME EQUITY MORTGAGE INTEREST \$ _____
 BOAT/MOTOR HOME INTEREST \$ _____

CHARITABLE CONTRIBUTIONS

CASH/CHECK (Must have receipt) \$ _____
 OTHER THAN CASH/CHECK (Must have receipt) \$ _____
 AUTO, BOAT or AIRPLANE DONATION (Bring Documentation) \$ _____
 PUBLIC CONTRIBUTIONS (STATE OF MI) \$ _____
 FOOD BANK CONTRIBUTIONS \$ _____
 MILEAGE FOR CHARITY # _____

MISCELLANEOUS DEDUCTIONS

IRA FEES PAID \$ _____	SAFE DEPOSIT BOX \$ _____
SMALL TOOLS (Required for work) \$ _____	EDUCATIONAL EXPENSES FOR WORK \$ _____
CLOTHING/CLEANING (Required for work) \$ _____	JOB SEARCHING EXPENSES \$ _____
UNION DUES \$ _____	MILEAGE EXPENSE Total # _____
TAX PREPARATION FEES \$ _____	Business # _____

CONTRIBUTIONS - IRA, Keogh, SEP, etc.

HUSBAND \$ _____ WIFE \$ _____

RENT PAID OUT (MI)

OF MONTHS _____ RENT PER MONTH \$ _____
 LANDLORD _____
 ADDRESS _____

HIGHER EDUCATION EXPENSES

SCHOOL NAME _____
 STUDENT _____ AMT PAID \$ _____
 SCHOOL NAME _____
 STUDENT _____ AMT PAID \$ _____

CHILD & DEPENDENT CARE EXPENSES

CARETAKER _____ \$ _____
 ADDRESS _____
 EIN or SSN _____

DEPENDENTS

DATE OF BIRTH

SOCIAL SECURITY NO. (Needed for Everyone)

RELATIONSHIP

This information was provided by me to Gurin & Gurin, P.C. for preparation of my 2009 income tax return(s).

Signature _____

Date _____

2009 RENTAL INCOME & EXPENSES

	<u>PROPERTY 1</u>	<u>PROPERTY 2</u>	<u>PROPERTY 3</u>
STREET ADDRESS	_____	_____	_____
CITY / STATE / ZIP	_____	_____	_____
INCOME	\$ _____	\$ _____	\$ _____
EXPENSES			
ADVERTISING	\$ _____	\$ _____	\$ _____
CLEANING & MAINTENANCE	\$ _____	\$ _____	\$ _____
INSURANCE	\$ _____	\$ _____	\$ _____
LEGAL & PROFESSIONAL	\$ _____	\$ _____	\$ _____
MANAGEMENT FEES	\$ _____	\$ _____	\$ _____
MORTGAGE INTEREST	\$ _____	\$ _____	\$ _____
REPAIRS	\$ _____	\$ _____	\$ _____
SUPPLIES	\$ _____	\$ _____	\$ _____
TAXES	\$ _____	\$ _____	\$ _____
UTILITIES	\$ _____	\$ _____	\$ _____
PAINTING & DECORATING	\$ _____	\$ _____	\$ _____
ASSOCIATION FEES	\$ _____	\$ _____	\$ _____
OTHER	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
AUTO - TOTAL MILES	# _____	# _____	# _____
AUTO - BUSINESS MILES	# _____	# _____	# _____

2009 BUSINESS INCOME & EXPENSES

	<u>BUSINESS 1</u>	<u>BUSINESS 2</u>	<u>BUSINESS 3</u>
NAME OF BUSINESS	_____	_____	_____
ADDRESS	_____	_____	_____
CITY / STATE / ZIP	_____	_____	_____
BUSINESS ACTIVITY	_____	_____	_____
GROSS RECEIPTS	\$ _____	\$ _____	\$ _____
COST OF GOODS SOLD			
MERCHANDISE PURCHASED	\$ _____	\$ _____	\$ _____
LABOR - WAGES	\$ _____	\$ _____	\$ _____
MATERIALS & SUPPLIES	\$ _____	\$ _____	\$ _____
INVENTORY (At cost as of 12/31/09)	\$ _____	\$ _____	\$ _____
EXPENSES			
ADVERTISING	\$ _____	\$ _____	\$ _____
BANK CHARGES	\$ _____	\$ _____	\$ _____
COMMISSIONS & FEES	\$ _____	\$ _____	\$ _____
DUES & PUBLICATIONS	\$ _____	\$ _____	\$ _____
INSURANCE - HEALTH	\$ _____	\$ _____	\$ _____
INSURANCE - OTHER	\$ _____	\$ _____	\$ _____
INTEREST	\$ _____	\$ _____	\$ _____
LEASE VEHICLE EXPENSE	\$ _____	\$ _____	\$ _____
LEGAL & PROFESSIONAL	\$ _____	\$ _____	\$ _____
MEALS & ENTERTAINMENT	\$ _____	\$ _____	\$ _____
OFFICE EXPENSE	\$ _____	\$ _____	\$ _____
POSTAGE & FREIGHT	\$ _____	\$ _____	\$ _____
RENT	\$ _____	\$ _____	\$ _____
REPAIRS & MAINTENANCE	\$ _____	\$ _____	\$ _____
TAXES	\$ _____	\$ _____	\$ _____
TELEPHONE	\$ _____	\$ _____	\$ _____
TRAVEL	\$ _____	\$ _____	\$ _____
UTILITIES	\$ _____	\$ _____	\$ _____
OTHER	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
AUTO - TOTAL MILES	# _____	# _____	# _____
AUTO - BUSINESS MILES	# _____	# _____	# _____

We value your trust and confidence, and we want to assure that your personal information is kept completely confidential by us. As a tax and accounting firm, we adhere to the highest level of professional and ethical responsibility and obligations to protect the confidentiality of all client information.

This *Privacy Policy* will help you understand what information we collect about you, the limited times we may share it with others, and what measures we take to protect your privacy.

WHAT PERSONAL INFORMATION DO WE COLLECT?

In order to meet your needs in the course of tax return preparation, tax and financial planning, and tax compliance engagements for you, we collect various types of personal information about you from the following sources:

- Information we receive from you in person, by telephone, mail or electronic mail through our website, on tax preparation worksheets, and on other documents or forms we use in preparing your tax returns or providing other services for you. Such information includes, but is not limited to, your name, social security number, income, investment and other assets, and other tax and financial information about you;
- Information we receive from others about your transactions or relationships with them. Such information includes, but is not limited to, investment, loan or banking activity, balances or account numbers, legal agreements and documents, and other information we gather in the course of providing services to you;
- Information we receive from you when your browser interacts with our website. This could include information transmitted on an Internet “cookie” such as a password to our site, your preferences on the site, and your Internet Service Provider’s address; and
- Information we receive from a consumer reporting agency such as your credit history and outstanding loan balances.

IS PERSONAL INFORMATION SHARED WITH OTHERS?

We do not share personal information about you with anyone without your express written consent, except as permitted by law and as described below.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

We may share information we collect (except for consumer reporting information which we do not disclose) to nonaffiliated companies which perform support services on our behalf (i.e. tax or data processing, transmission of electronic returns or data, records retention, and mailing services). We **DO NOT** sell or otherwise disclose our client list or any of your information to outside companies for their marketing or solicitation use.

We may also share your information with other parties that help assure our compliance with professional accounting standards (i.e. peer review) or that conduct due diligence procedures.

HOW DO WE PROTECT THE CONFIDENTIALITY & SECURITY OF YOUR PERSONAL INFORMATION?

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, security, and integrity of your personal information. We also maintain physical, electronic, and procedural safeguards to guard your personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. And, we take appropriate precautions before sharing your information with any outside parties.

Should you become an inactive client or should our relationship end, we will continue to protect the confidentiality and security of your personal information in accordance with this *Privacy Policy*.

OUR PLEDGE TO YOU

As accountants, our professional ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. We will protect your personal information, use it only as necessary, and perform our engagements so as to always maintain your trust and confidence in us.

Thank you for allowing us to be of service; we truly value our relationship with you. We hope you view our firm as your most trusted advisor, and we will work to continue earning that trust. Please call us anytime you have questions or if we may be of further service.