

Federal Information Worksheet

TAXPAYER

Last Name _____
 First _____
 Middle Initials _____
 Social Security # _____
 Occupation _____
 Date of Birth _____
 Home Phone _____
 Work Phone _____
 Pager/Voice _____

SPOUSE *(As it appears on your Social Security card)

Last Name _____
 First Name _____
 Middle Initials _____
 Social Security # _____
 Occupation _____
 Date of Birth _____
 Home Phone _____
 Work Phone _____
 Pager/Voice _____

The address below is where you claim your residency for tax purposes or what appears on your W-2's. This address is where the **IRS** will mail your refund.

Address _____ Apt # _____

City _____ State _____ Zip _____

FEDERAL FILING STATUS: Check one status only

Definition:

Single: (You are a single person without dependents)

Married Filing Jointly: (You are legally married to your spouse and want to file together)

Married Filing separately: (You are legally married but want to file separate for personal, financial, or business reasons).

Head of Household: (You are a single parent with a dependent such as your child, adoptive child, a parent, sister, brother, niece, awarded custody, or someone you are truly taking care of in your home. You must be able to prove you provide full care such as medical, dental, school records, day care, living expenses, food and much more. This person can not be a deadbeat relative, a boyfriend, a girl friend, a dog, a cat, or a horse. There are some exceptions if the parent you are taking care of doesn't live with you reside in a nursing home, or in their own home, and then you will be able to claim them.

Qualified Widow (er): (Death of your spouse in the last two years)

- Single
 Married Filing Jointly
 Married Filing Separately
 (Spouse Name & S.S.#): _____
 Head of Household
 Widow (er)

If you just recently got married, or even if you got married on the last day of the year. The **IRS** still considers you as Married for the full calendar year. Therefore, your above filing status will be either jointly or separately.

If you got married and didn't change your last name, please do so! This can delay your refund tremendously.

Name of dependents

Please list below all of your dependents. Include full name, age, date of birth, social security number, relationship to you, and the number of months they lived with you during the year. All dependants must have a social security number or the **IRS** will reject your tax return. If you have a newborn try to get a S.S.# immediately.

Name of Dependent	Age	DOB	Social Security #	Relationship	No. of month

Wages and Income

1. Please enclose all **W-2's** that you and your spouse received from your employers.
2. If you or your spouse is self employed then you will need to total your income earned for the year.
3. Enclose all **1099-Misc** forms (Sometimes you get this for your service as a self employed person).
4. **1099-G Form:** (This form will show the amount of refund you received last year from the State. Just simply look at your state return and determine how much you received).
5. Unemployment income you received.
6. Income from Jury Duty
7. Early withdrawal: **Form 1099-R** on CD's, 401K pension, IRA's, 403 pensions, Annuities etc.
8. Alimony income (Do not include child support): **Child support is non-taxable and non-deductible.**
9. Gambling winnings (**1099-Misc**), Lotteries, Contest winning.
10. K-1 forms and supporting documents from partnerships.

***If you borrowed against your 401K plan it is not considered an early withdrawal. It is simply a loan against your own money that you have to pay back with interest to yourself.**

*** All of the document will be returned to you for your record keeping.**

Please answer the next two questions as accurately as possible. The information can be found on last year's tax returns and the estimated tax payments made to the **IRS** and **State** can be found by a simple phone call to the **IRS** and your **State Taxation Dept.** The federal information is needed for comparison and the state information is used for your tax credit.

Federal refund from last year \$ State refund \$ (See 1099-G form)

Federal taxes paid last year \$ State taxes paid \$ (Did you paid the IRS or State)

Estimated taxes are taxes a taxpayer pays themselves to the IRS and State when they anticipate to make more money from Self-employed income, Lotteries, Gambling winnings, Free-Lance income, Real estate sale, Unemployment, etc. This will help reduce your liability for the next year.

Did you make any estimated payments to the Internal Revenue Service and/or State Taxation Dept.? Yes No

Internal Revenue Service

State Taxation Dept.

Jan 15th

Apr 15th

Jun 15th

Sept 15th

Interest and Dividend Income Earned

Interest income is earned on CD's, checking and savings accounts

Dividend income is earned on mutual funds, and other types of investments.

You should receive a form **1099-Int** or **1099-Div** in the mail from your bank or investors company.

Bank/Financial Institution	1099-Int	1099-Div
_____	\$ _____	\$ _____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Complete this section if you purchased or sold stocks: **Forms 1099-B or 1099-S**

<i>Desc. & # of shares</i>	<i>Date acquired</i>	<i>Date sold</i>	<i>Sale price</i>	<i>Cost price</i>	<i>(Loss)</i>	<i>(Gain)</i>

List additional information separately and itemize them.

Sale of Home

If you sold your home and purchased another or plan to purchase another home please complete this section. Refer to your old & new settlement statement for this information.

Date old residence purchased Cost of old Home Date old home sold

Home improvements: (Additions, Landscaping, Driveway, New Roof, Sprinkler system etc.)

Fixing-up expenses (Painting, repairs, etc. to prepare for sale)

Expense of Sale: Commissions, legal fees, points, inspections, etc.

- (A). Was any part of the residence rented or used for business? Yes No
- (B). Was it your principal place of residence for 3 of the last 5 years? Yes No
- (C). If over 55 (you or spouse), do you want to use your Tax Free provision? Yes No

Date new residence purchased Cost of new residence \$

- (D). If new residence was new constructed, did you pay for building materials? Yes No
- (E). If new residence not yet acquired, do you plan to purchase one within 24 months from date of sale? Yes No
- (F). If married, do you and your spouse have the same proportionate Interest in the new residence as in the old? Yes No

Medical Expenses

Medical expenses are subject to 7.5% of the AGI, therefore a person can have medical expenses, but if it does not exceed .075 percent of your annual gross income you will not get any deduction. Only the portion you paid out of pocket and not what the insurance paid. **Quick Check:** (Multiply your gross income) x (.075) = (This amount is what you must exceed).

Health Insurance premiums	\$ <input type="text"/>	Eyeglasses	\$ <input type="text"/>
Dental premiums	\$ <input type="text"/>	Oxygen equip.	\$ <input type="text"/>
Prescriptions	\$ <input type="text"/>	Medications	\$ <input type="text"/>
In Home care	\$ <input type="text"/>	Regular transportation	\$ <input type="text"/>
Surgical fees	\$ <input type="text"/>	Specialist	\$ <input type="text"/>
Medical consultations	\$ <input type="text"/>	Contacts	\$ <input type="text"/>
Alcohol/Drug treatment	\$ <input type="text"/>	Dental surgery	\$ <input type="text"/>
Orthodontics	\$ <input type="text"/>	Braces	\$ <input type="text"/>

Mileage rate for medical is 20 cents a mile.

Attach other itemized expenses incurred:

Taxes

Real Estate tax on your home. (See **1098 Form**) \$

Real Estate tax on second home (Not rental)

Personal property tax: (VA, SC, NC).
(Vehicle registration, Car, boat, small bldg., Motorcycle, etc.).

Other taxes: (Land, commercial bldg., last year state taxes paid).

Mortgage Interest

The interest you are paying on the loan to purchase your home or property. Your lender will send you a **Form 1098**. If you can't find it just call your lender for the information. New, you may be able to certain mortgage Insurance premiums that are paid in connection to home acquisition debt.

If you have Rental property do not include the mortgage interest in this section. Go to **Rental Property**.

Please fill in the information below if you understand your statements or submit your 1098 forms with the Organizer.

Mortgage Lender Name (Form 1098)

	Amount <u>paid</u>
_____	\$ <input type="text"/>
_____	<input type="text"/>
_____	<input type="text"/>

If you refinanced and paid points, or got a Home equity loan for debt consolidation, home repair, Vacation, etc. the interest is deductible.

Home Equity loan \$

Home improvement: (Home Equity loan and not a personal loan)

Consolidation loan / vacation etc. :(Not a personal loan)

*** New homeowners and refinances please submit a copy of your settlement statement. Interest, tax, and points are deductible.**

Charitable Contributions

Two types: Cash or Material Goods (Clothes, furniture, and miscellaneous items).

Contributions you made in the tax year to any Nonprofit organization,(Churches, Temples, United Way, Goodwill, Salvation Army, CARE, Boys & Girls Club of America, Public park and Recreation, Hospitals, Colleges, Red Cross, Fire Fighters, Police, Aids Research, Museums, Disaster Relief, Cancer Foundation, MS Disease, Education, etc.) **New recordkeeping requirements for cash contribution**, you cannot deduct cash unless you keep as a record of the contribution, such as a canceled check, bank statement, or written communication from the charity.

Non deductible or Non qualified organizations are Civic leagues, Labor unions, Clubs, Home associations, Political groups, Country clubs, Dues to Fraternal Orders, Contributions for lobbying, the value of time you lost for volunteer work, Tuition for children, Special interest groups, etc., After Feb. 13, 2007 you can no longer deduct contributions to donor advised funds .

Reminder: If your Non-cash (Material Goods) contributions are valued more than \$500, then you are required to file form 8323 which must be completed with the Organization Name & Address, Type of goods donated, Date donated, Date of original purchase, Original cost, Fair market value, and Appraisal (If required). **You must supply us with this information!**

Reminder: Generally, Fair market value of used clothing and household goods is far less than its original cost. The value would be what a buyer pays at a Thrift store or consignment shop. If you donated a car, boat, airplane, paintings you must use the selling price of the charitable institution guide lines or an Appraiser.

Donated Money:

<u>Organization Name</u>	<u>Amount</u>	<u>Organization Name</u>	<u>Amount</u>
_____		_____	
_____		_____	
_____		_____	
_____		_____	

Material Goods (Clothes, furniture, miscellaneous items, etc.)

<u>Organization Name</u>	<u>Amount</u>	<u>Organization Name</u>	<u>Amount</u>
_____		_____	
_____		_____	
_____		_____	
_____		_____	

Reminder: If your total amount of material Goods donation is greater than \$500 you will have to supply the additional information.

Casualty or Theft Losses

Casualty or Theft involves property destroyed by natural disasters and fire or stolen valuables such as jewelry, car, and other household goods.

Special limitations are applied and the valuables must be more than 10% of your AGI after your insurance reimburses you. There are other things to consider such as description of the property, location, date of purchase of each property/item, and copy of police report if items were stolen. If your property was destroyed by natural disaster, you will need photographs, insurance adjuster records, and amount of reimbursements paid to you, etc.

Quick Check: Small items that were stolen such as flight luggage, uniforms, inexpensive jewelry (Watches, rings, necklace, and old commuter car) will not be enough for a deduction.

If you were effected by Casualty or Theft and feel your losses were great, please submit an attachment sheet with the below items.

1. Description of property
2. Location where damaged or stolen
3. Date of your purchase or cost basis of each item
4. Copy of Police/Fire dept. report
5. Insurance Adjuster report
6. Amount of insurance reimbursement
7. Fair market value of items or property before and after the incident.

Other Deductions or Questions

Notes: • Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.

- Work clothing is not deductible if adaptable for every day wear. ; Exception for safety equipment such as steel-toe boots.
- Legal expenses are deductible only if related to producing or collecting taxable income.
- Expenses to enable physically or mentally impaired individuals to work are generally deductible.

Adjustments Worksheet

Educator expenses: Classroom expenses of teachers, counselors, and principals. Maximum \$250 each (\$500 joint). \$

Health savings account deduction (HSA). \$

New this year additional standard deductions, based on state and local property tax paid. Higher standard deduction increased for most taxpayers. First time Homebuyer credit ask your tax professional to explain Self-employed, SEP, SIMPLE, and qualified plans. Some contributions for 2009 may be made in 2009. \$

Self-employed health insurance deductions .are for sole proprietors and partners if they are not eligible for employer coverage. \$

IRA deduction for traditional IRAs, Roth IRAs are not deductible. Some contributions for 2009 may be made in 2010. \$ *Student loan interest is a deduction. If paid for taxpayers and dependents. Income limits apply.* \$

Tuition and fees deduction: Qualified tuition and fees if not claiming education credits. Income limits apply. \$

Moving expenses. Job-related move and at least 50 mile increase in commuting distance. Ask preparer

Business expenses of reservists, performing artists, and fee-based government officials. Ask preparer

Standard Mileage rates adjusted for 2009 on business use of a car, van, pick-up or panel truck 55 cents per mile.

Home Operated Business / Self Employed

Name of owner: _____ Federal ID # _____

Business Name: _____

Address: _____ State _____ Zip _____

Business Profession, including product or service _____

Did you materially participate in the operation of the business during the year? Yes No

Is this your first **Schedule- C** filed for this business? Yes No

Part I: Income

1. Gross Receipts or Sales	\$ _____
2. 1099-Misc. income earned	\$ _____
3. Other income earned	\$ _____
4. Returns or Allowances	\$ _____
5. Cost of goods sold	\$ _____

Part II: Expenses

Advertising	\$ _____	Business property taxes	\$ _____
Bad debts from sales	\$ _____	Business Licenses	\$ _____
Car and Truck expenses	\$ _____	Sales Tax	\$ _____
Commissions paid	\$ _____	Postage, faxing, copying	\$ _____
Depreciation and Section 179 expenses	\$ _____	Janitorial Services	\$ _____

Employee benefits	\$ _____	Business Phone	\$ _____
Business insurance	\$ _____	Business Electric expenses	\$ _____
Professional Dues	\$ _____	Business Gas expenses	\$ _____
Freight, UPS, FedEx	\$ _____	Business Water expenses	\$ _____
Mailing expenses	\$ _____	Voice service	\$ _____
P.O. Box rental	\$ _____	Business Cellular phone	\$ _____
Office expenses	\$ _____	Supplies	\$ _____
Office supplies	\$ _____	Bank fees & Charges	\$ _____
Business rent/lease	\$ _____	Travel expenses	\$ _____
Equipment leasing/rental	\$ _____	Parking	\$ _____
Tools	\$ _____	Tolls	\$ _____
Legal fees	\$ _____	Wages	\$ _____
Business loan interest	\$ _____	Meal expenses/Clients	\$ _____
Publications	\$ _____	Dry cleaning & Laundry	\$ _____
Uniform expenses	\$ _____	Web site charges	\$ _____
Computer/Printer	\$ _____	Business software	\$ _____
Consulting fee	\$ _____	Car leasing (Business only)	\$ _____
Training expenses	\$ _____	Annual Business card fees	\$ _____
Seminars fees	\$ _____	Related books	\$ _____
Required Educational expenses	\$ _____	Tuition's	\$ _____
Pension Profit share Plan	\$ _____	Maintenance Repairs	\$ _____
Federal estimated taxes paid	\$ <input type="text"/>	State estimated taxes paid	\$ <input type="text"/>

When using mileage the below information is needed.

Type of vehicle _____ Make and Model _____ Year _____

When did you place your vehicle in service for business? ____/____/____.

Total miles for the year _____ How much are business miles? _____ Commuting miles _____

Do you have evidence to support your deduction? (Yes/No) ____ If "Yes" is the evidence written? (Yes/No) ____

EFTPS, electronic Federal Tax Payment System a method for small business to pay their taxes electronically, there are various electronic payment options available ask for publication 3611.

"EFTPS offers you the convenience and flexibility of making your tax payments via the Internet or phone. By 8:00 P.M. (ET) at least one calendar day in advance of the due date, you access EFTPS directly to report your tax information. You will instruct EFTPS to move the funds from your account to the Treasury's account for payment of your federal taxes. Funds will not move from your account until the date you indicate. You receive an immediate acknowledgement of your payment instructions, and your bank statement will confirm the payment was made."

ASK YOUR TAX PREPARER ABOUT THE DIFERENT METHODS TO PAY TAXES DUE.

Rental Property or Schedule-E

Complete this section only if you have rental property

List type: (Home, Condo, Beach front, Townhouse or Mobile home along with the address)

Section I

Property A _____

Property B: _____

Property C: _____

For each property listed in section I, did you or your family use it during the tax year for personal purposes for more than the greater of 14 days or 10% of the total days rented at fair market value? If "Yes" which property?

_____.

Income

A

B

C

Rental Income you received

\$ _____

\$ _____

\$ _____

Expenses:

	<u>Property A</u>	<u>Property B</u>	<u>Property C</u>
Advertising	\$ _____	\$ _____	\$ _____
Auto and Travel expenses	\$ _____	\$ _____	\$ _____
Cleaning and Maintenance	\$ _____	\$ _____	\$ _____
Commissions paid	\$ _____	\$ _____	\$ _____
Property Insurance	\$ _____	\$ _____	\$ _____
Legal and Professional fees	\$ _____	\$ _____	\$ _____
Property management fees	\$ _____	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____	\$ _____
Real Estate tax	\$ _____	\$ _____	\$ _____
Other taxes	\$ _____	\$ _____	\$ _____
Repairs to property	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Utilities on property	\$ _____	\$ _____	\$ _____
Landscaping	\$ _____	\$ _____	\$ _____
Sprinkler systems	\$ _____	\$ _____	\$ _____
Fence or Deck installation	\$ _____	\$ _____	\$ _____
New Windows	\$ _____	\$ _____	\$ _____
Driveway repairs	\$ _____	\$ _____	\$ _____
Home Association fee	\$ _____	\$ _____	\$ _____
Condo fee	\$ _____	\$ _____	\$ _____
Other expenses	\$ _____	\$ _____	\$ _____

*Some or all of the information below **CBWrights Financial Services** will probably have on file. However, if you purchased new rental property or this is your first time deducting rental expenses, please supply us with the information. Last years depreciation amount \$ _____ Date you place property in service ____/____/____ Purchase price of property \$ _____ Land accessed value \$ _____

Child Care Expense

If you are paying someone or a Child care facility you are eligible to take a tax deduction credit. The information of the person or childcare facility must be complete or the **IRS** will reject it.

If the provider is an individual then their social security number must be obtained. If it's a Day care facility they can provide you with their federal identification number.

*Name of provider, Address, ID # or Social Security #, Amount paid, and # of dependents in childcare.

Name of Provider	ID# or Soc. Sec. #	Address	Amount

Number of dependent in childcare:

Total paid \$

Moving Expenses

Moving expenses are deductible if you move to take on a new job, are required by your employer to move, or a military change of job location. (You meet the distance and time test.) The move must be 50 miles or more.

New Tax Law changes:

Deductible expenses: Lodging (Hotel, Motel expenses), Car rental, parking & tolls during move, the mileage on vehicle, moving your household goods, U-hauls, transit storage expenses, airfare, insuring personal goods when moving.

Non-deductible expenses: Pre-move expenses, temporary living expenses, meals, expenses of buying or selling home, loss on sale of your home, security deposit during move and getting or breaking a lease.

What city or state did you move from? _____ What city or state did you move to? _____

What's the total number of miles from your old home to your new job? _____ miles.

What's the total number of miles from your old home to your old job? _____ miles.

Expenses:

Transportation expenses (Airfare, U-haul, Trailer, and bumper hitch rental)	\$ _____
Storage unit (3 months only)	\$ _____
Hotel expenses	\$ _____
Mileage expenses of your vehicle (Standard miles rate)	\$ _____
Parking and tolls associated with the move	\$ _____

Miscellaneous expenses

If you or your spouse are not in the Airline industry and have travel related, military, and business expenses that are related to your job and your employer did not reimburse you for those expenses, please complete this section.

Professional subscriptions	\$ _____
Work uniforms expenses	\$ _____
Uniform laundry & dry-cleaning	\$ _____
Second job business mileage (.48 per mile)	\$ _____
Job hunting expenses (Resumes, faxing, and copying)	\$ _____
Labor union dues	\$ _____
Military uniforms	\$ _____
Arm forces (Reserve duty miles) .48 per mile	\$ _____
Cellular phone for business	\$ _____
Pager/Voice service	\$ _____
Parking and tolls	\$ _____
Safety deposit box	\$ _____
Investment expenses	\$ _____
Alimony paid: (List) Name _____ S.S.# _____	\$ _____
Tax advice, software and books	\$ _____
Employment agency fee	\$ _____
Work shoes (Steel toe)	\$ _____
Safety Work gloves	\$ _____
Total expenses	\$ _____

Last years Tax Preparation cost: (Including EF, mailing fees). \$ _____

New Tax Law Changes:

Making you Work Credit. In 2009 and 2010, the Making Work Pay provision of the American Recovery and Reinvestment Act will provide a refundable tax credit of up to \$400 for working individuals and up to \$800 for married taxpayers filing joint returns.

First-Time Homebuyer Credit Expands. Homebuyers who purchased in 2009 can get a credit of up to \$8,000 with no payback requirement. New legislation extends and expands this credit to homes purchased by April 30, 2010.

Enhanced Credits for Tax Years 2009, 2010. For earned income tax credit and additional child tax credit

COBRA: Health Insurance Continuation Subsidy. The IRS has [extensive guidance for employers](#), including an updated Form 941, as well as [information for qualifying individuals](#).

Work Opportunity tax credit. This [newly-expanded credit](#) adds returning veterans and "disconnected youth" to the list of new hires covered by the credit that businesses may claim.

Health Coverage Tax Credit. The credit increases from 65 percent to 80 percent of qualified health insurance premiums, and more people are eligible.

Energy Efficiency and Renewable Energy Incentives.

Money Back for New Vehicle Purchases. Taxpayers who buy certain new vehicles in 2009 can [deduct the state and local sales taxes](#) they paid or other taxes and fees they paid in [states with no sales tax](#).

\$250 for Social Security Recipients, Veterans and Railroad Retirees. The [Economic Recovery Payment](#) will be paid by the Social Security Administration, Department of Veterans Affairs and the Railroad Retirement Board.

New Forms and Schedules to file out like schedule M and Schedule L contact your tax advisor

Retirement savings plans

There are several new tax provisions involving pension security for workers, IRAs and 401 (K) plans. Please ask your tax preparer about them. These changes may affect you. Some retirement contributions may be eligible for 10-50% credits maximum credit \$1000 (\$2000MFJ) based on modified AGI.

Education Benefits

Expense eligible for credits are expanded to include cost of room and board for student enrolled at least half-time, as well as tuition, fees, books, supplies, and equipment required for student's enrollment. Hope credit is 100% of the first \$2,500 of eligible expense, and 50% of the next expenses.

Maximum is \$2,000. The lifetime learning credit is 40% Income limits have increased for both credits. The new American opportunity credit and enhanced benefits for 529 college savings plans help families and students find ways to pay higher education expenses.

Deduction on Student loan you incurred after December 31, 2009

The maximum benefit is \$2,500 deducted from your income subjected to tax. Phase out of your deduction depends on your income.

You must elect the Hope Credit **or** Lifetime Learning credit and not both if you, spouse, or dependent have post-secondary education.

The Hope Scholarship Tax Credit expenses

\$ _____

The credit is 100% of the first \$1,200 of expenses and 50% of the next \$1200, for the first 2 years of post-secondary education.

The Lifetime Learning Credit expenses

\$ _____

The Lifetime Learning credit is equal to 20% of qualified expenses up to \$10,000 with a maximum benefit of \$2,000 per taxpayer.

Qualified educational expenses

\$ _____

If your employer or a law requires educational expenses and it is needed to maintain or improve skills in your work

***2 GREAT
PAYMENT
PLANS***

1. You can pay when you submit your Organizer for preparation. This helps keep cost down and faster service. **This is preferred.**
2. We accept postdated checks for the correct amount. Your check must be submitted with the Tax Organizer or processing will be delayed. The check must be postdated no later than your next payday, which is usually the 15th or the 30th and not to exceed 30 days. **We also accept debit and major credit cards**
3. Please call if you have any questions

*****Checks that are returned for non-sufficient funds will be charged \$25.00*****

Example based on a single taxpayer:	Federal tax return	\$75.00
	State tax return	\$30.00
	Electronic filing	\$25.00
(Optional)	First Class Mail	<u>\$ 4.50</u>
	Total charge	\$139.00

Additional charges for certain forms

You can request your documents to be returned to you overnight by Federal Express or US Postal Service.

However, Federal express is more expensive with price ranges from \$6.50 to \$26 depending on weight.

US Postal service charges \$4.50 for priority mail 2 or 3 day service and \$5.75 with a return receipt. This is how your important documents will be returned. *The increase is due to increase in postage and document weight.

Refund from the IRS

There are several ways to receive your refund from the IRS, which makes a difference in your wait time and savings to you.

1. Use regular mail if you file early. The return time usually takes 6 weeks. Your cost is just a few stamps! This process can take longer if you mail is lost or stolen. Always mail you tax return certified mail.
2. Electronic filing: A process which takes 2 weeks or 14 to 21 days in which your refund can be deposited directly into your checking or savings account. This process is quicker and safer from being lost or stolen.
3. Fast Fund (RAL): Fast Fund is a process in which your refund is processed in 4 to 5 days. Your tax refund is electronically filed and accepted by the IRS. Fast Fund is a loan secured by a bank (Santa Barbara) of your anticipated refund, which is automatically paid off when your refund arrives from the IRS. CB Wright Financial Services gets the authorization to print the check before it is sent to you.

Reminder: Fast Fund is more expensive because a bank secures the loan and charges a fee based on the amount of the refund. We do not recommend Fast Fund for this reason, however if you need your refund urgently please call for further details.

Price List Clients

Federal Income Tax return (Single)	\$ 65.00
Federal Income Tax Return (Joint)	\$ 90.00
State Income Tax return	\$ 25.00
Additional State Tax return such as Part-year or Non-Residence	\$ 15.00
Schedule-C (Self Employed with gross income of (depends on length of work)	\$ 25.00
Schedule-C (Self Employed with gross income of \$5,000 or More)	\$ 40.00
Schedule-D (Less than three share transaction entries)	No Charge
Schedule-D (Greater than three share transaction entries)	\$ 10.00 may change
Schedule- E (Rental Property) with three or more property	\$ 25.00
Electronic Filing fee	\$ 25.00
Fast Fund Refund (4 to 5 days)	Please call for more details
Amendments are based on contingency fees of 12% versus hourly	Please call for more details
Request of copy any past year tax return	\$ 10.00

Shipping and Handling fees

After the tax returns are completed they will be returned to you for your review and signature.

Federal Express (3 business day)	\$ 7.25
US Postal Service (2 or 3 day priority)	\$ 4.50
US Postal Service (2 day priority with return receipt)	\$ 5.75

Please do not forget to enclose your payment with your Organizer and tax information

This organizer is to assist you in organizing and gathering your information. If you are a new customer please call with any questions that you might have and please keep all questions brief and to the point. This will help us from spending time so much time over the phone or at your appointment.

First, gather all of the necessary information you will need such as paystubs, W-2's, cancelled checks, logbook, interest earned statements, mortgage interest, property tax records etc. Remember, you may have a lot of deductions related to your occupation so tell us. If you don't fill out the organizer CBWright Financial Services can not assume for you or spend countless time over the telephone to fill it in for you! So please take your time and total your receipts and check your logbook for all deductible expense. Answer the questions that pertain to you and your spouse only. This is very important if you are trying to lower your taxes or maximize your refund.

C B Wright's Tax & Financial Service will accept estimates that are reasonable, common sense and what you can verify. Please do not send us large volumes of receipts, just the totals.

Check List

1. Name of all dependents, social security numbers, date of births, and correct age.
2. Check your mailing address and apartment numbers.
3. If you got married last year make sure your social security card reflects your new name.
4. Call your local Social Security office and request form SS-5 for a new social security card.
5. Make sure you complete all sections that apply to you in the Tax Organizer.
6. If you desire "Electronic Filing" with direct deposit make sure you sign and date Part II of the 8897 form and enclose a voided check of your desired bank account.
7. If you desire the "Quick refund" please give us a call for further instructions at 757-471-3613 if a tax advisor is not in please leave a message on the machine.
8. If you are a new client send us your previous year tax return.
9. Enclose your 1099-Rs for early withdrawals from pensions and IRA distributions.
10. Enclose visible all W-2's from your employers. 1099-INT 1099 DIV, 1099-B(proceeds from broker or barter transactions
11. Attach any statements or detail list of any information that you think is important.
12. Earned interest and dividends from your credit union, and financial institutions.
13. Telephone and cell numbers for contact purposes.
14. Alternate address for correspondence.
15. Real estate and personal property tax paid in your state of residence.
16. Capital gain / losses and gains from stock transactions.
17. Rental property income and expenses.
18. Make sure you tell us what your state refund was last year. It's taxable on the federal.
19. Travel and Business related expenses
20. Enclose payment to expedite your tax return.

Privacy Policy

The nature of our work requires us to collect certain non-public information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment.

Under our policy, all information we obtain about you will be provided by you or obtained with your permission. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except when required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct.

Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Contact Us

There are many events that occur during the year that can affect your tax situation. Preparation of your tax return involves summarizing transactions and events that occurred during the prior year. In most situations, treatment is firmly established at the time the transaction occurs. However, negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects of a transaction or event, including the following:

- Pension or IRA distributions • Sale or purchase of a residence or other real estate
- Significant change in income or deductions • Retirement
- Job change • Notice from IRS or other revenue department
- Marriage • Divorce or separation
- Attainment of age 59½ or 70½ • Self-employment
- Sale or purchase of a business • Charitable contributions of property in excess of \$5,000

CBWRIGHT'S TAX & FINANCIAL SERVICES

3977 JOUSTING ARCH

VIRGINIA BEACH, VA 23456

E-mail address: cbwright@exis.net

Web page www.cbwrightservices.com

"We know the tax business"