



TIMOTHY D. POWERS, PLC

CERTIFIED PUBLIC ACCOUNTANT

995 East Miller Road

Plainwell, MI 49080

Call (269) 685-8047 for an appointment

email: tim@powersaccounting.com

Taxpayer(s) Names and Address

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Please complete form and bring it with you to your appointment or drop it off with the rest of your tax information if using our drop off service.

Daytime phone number? _____

Evening phone number? _____

Any change in marital status? Yes No

Change of address? Yes No

Dependents - update as necessary

Name	SS#	DOB

Common W-2's & 1099's - Provide Original Copies

W-2's
1099-R (pension and IRA distributions)
1099-Int (interest income statement)
1099-Div (dividend income statement)
1099-B (proceeds from the sale of stock)
SSA-1099 (social security income)
1099-G (unemployment earnings)
1099-Misc (Miscellaneous Income from self-employment)
W-2G (Gambling Winnings)
1099G (refund from state income tax filings)

Itemized Deductions

	\$ Amount
Medical, Dental, Optical & Prescriptions	
Health Insurance Premiums Paid (don't include the amount deducted from your paycheck)	
Property Taxes (attach receipts if available)	
Vehicle Plates	
Sales Tax Paid on Vehicle/Boat/Mtr home	
Mortgage Interest (attach forms 1098-int)	
Mortgage Interest - 2nd	
Donations - Cash or Check	
Donations - Goodwill, etc.	
Union Dues	
Safe Deposit Box Fee	
Job required expenses	

Other

College Tuition Statements (1098-T) & cost of books and equipment (ie computers) required to take the class
Closing papers for home purchases or sales

Daycare Provider Information

Name/Address	SS#/TIN	Amount

State Information

	\$ Amount
Rent Paid	
Child Support Received	
2012 Home "Taxable Value"	

New for 2012

Federal tax law changes: Waiting on Congress to decide -- refer to my webpage.
State tax law changes: Taxation of pensions for taxpayers born in 1946 and later Eliminates property tax credit for taxpayers with household income > \$50,000 or homes with taxable value > \$135,000 Reduced Earned Income Credit for low-income families Eliminated Charitable Contribution Credits