Prepared By:

E. P. Tremblay & Associates Inc.
35 Bowker Terrace
Somerset, MA 02726

Prepared For:

,

2009 Client Organizer

E.P. Tremblay
and Associates, Inc.

January 16, 2010 **Firm Cover Letter**

Dear :

As in past years, it is generally not necessary to make an appointment to bring in your tax work if we prepared your 2008 tax returns. You can mail or drop off your paperwork during normal office hours which are 9:00AM to 5:00PM, Monday through Friday. Tax season hours, from January 23rd through April 14th, will be 9:00AM to 9:00PM Monday through Thursday, 9:00AM to 5:00PM Friday & Saturday. We will close at 5:00 PM on April 15th and will return to normal office hours 9:00AM to 5:00PM Monday through Friday. If you drop off your paperwork, we will contact you if we need any additional information. If you prefer to make an appointment to discuss your tax returns, please call the office.

Everyone should receive a tax organizer with this letter. We use tax organizers as a tool to accumulate information needed to prepare your tax returns. Organizers show your 2008 data and provide a space for 2009 data. Those clients who used a complete organizer last year should receive a complete organizer with this letter. Every client should receive at least a partial organizer containing basic information. If you didn't receive a complete organizer and would like one, please call the office.

Please review and revise the basic information and complete the questionnaire included with this letter. Don't be concerned if you don't know how to answer a question. Just leave a question mark next to the question and we will contact you if the question is applicable to your tax situation and we need an answer.

There are some important changes that I want to bring to your attention. Some of these changes will require that you provide us with information that we have not asked you for in the past. Please review the page of Federal & State tax law changes included with this letter and provide us with any applicable information.

Please be advised that we now require a signed Letter of Engagement. Also, a Consent to Use of Tax Return Information is required if you ask for information about certain other services offered by E.P. Tremblay. These letters are enclosed with this mailing. Please return one copy of these signed letters with your tax information.

Thanks for your continued business.

Sincerely,

Mark L. Tremblay
President

35 Bowker Terrace, Somerset, MA 02726 Tel. 508-675-7557 Fax 508-567-1196

Federal Income Tax Changes

- **Residential Energy Credit-**A tax credit of 30% of the cost of eligible energy saving improvements installed in your principal residence during 2009 or 2010. The credit is limited to $1500 over the two years.

- **Mortgage Insurance Premium-**FHA, VA and private mortgage insurance premiums paid on new mortgages connected with the purchase of a first or second home after 12/31/06 are deductible as an itemized deduction. The deduction is subject to income phase-out limits and limited to premiums paid or accrued for 2009.

- **Making Work Pay Credit-**If you qualify, you will receive a credit equal to 6.2% of your earned income up to $400 ($800 if married filing jointly). This credit is reduced by any Economic Recovery or Government Retiree Credit. The effect of this credit may be offset by reductions in income tax witholding that were effective in May of 2009.

- **Unemployment Compensation**. You do not have to pay tax on unemployment compensation up to $2400 per recipient. Amounts over $2400 are still taxable.

- **Standard Deduction Increased for Real Estate Taxes-**Taxpayers who use the standard deduction may add up to $500 if single and $1000 if married for real estate taxes paid in 2009. **Please provide us with the amount of real estate taxes paid in 2009.**

- **First Time Homebuyers Credit-**Taxpayers who purchased a first home in 2009 and some existing homeowners who bought a home to use as their principal residence after November 6, 2009 may be eligible for a substantial tax credit of up to $8,000 ($6500 for existing homeowners). If you think you may qualify for the credit, please provide us with details of your purchase including a copy of your settlement statement. Please notify us if you claimed a first time homebuyer credit for 2008 and you sold the home or it ceased to be your principal residence in 2009.

- **Automobile Standard Mileage Rate-**The standard mileage rate deduction for business & work related automobile use was changed to 55 cents per mile**.** The rate has been reduced to 50 cents per mile for 2010.

- **American Opportunity Tax Credit (FKA Hope Credit)-**A tax credit for qualified educational expenses of a full time college student in the first <u>four</u> years of college is available for the first $2,000 and 25% of the additional expenses up to a maximum credit of $2500. 40% of the credit up to $1,000 maximum is refundable. The credit is subject to phaseouts for taxpayers with adjusted gross incomes between $80k-90k($160k-180k for married filing jointly). The definition of eligible expenses has been changed to include <u>course materials</u>**.** **Please be sure to give us an amount for the cost of course materials paid in 2009.**

- **Deduction for Motor Vehicle Taxes-**Sales taxes paid on a new (not used) motor vehicles purchased after 2/16/09 and before 1/1/10 are deductible whether or not you are itemizing deductions. The deduction is limited to taxes paid on the first $49,500 per vehicle. More than one purchase can qualify. Certain motorcycles and motor homes qualify. The deduction is phased out for taxpayers with adjusted gross income between $125k-135k ($250k-260 for married filing jointly).

MA Income Tax Changes

- **Circuit Breaker Credit Increased-**A taxpayer age 65 or older may claim a tax credit of up to $960 if they pay real estate tax on or rent a principal residence located in MA and meet all of the qualifications. To see if you qualify, please provide us with the amount of real estate tax, rent, and water utility payments made in 2009. If you own your home we also need the assessed value of your property.
- **Mandatory Health Insurance-** As a result of the health care reform law, most Massachusetts residents age 18 and over are required to have health insurance. If you cannot show that you had health insurance with **Minimum Creditable Coverage** for all of 2009 you may be subject to penalty. If you do have health insurance, please provide the information required on the MA organizer page included with this letter. If you had health insurance with a private insurance company, you should receive Form MA 1099-HC. Please include the form with the tax documents you give us to prepare your returns. **The 2009 MA 1099-HC has been revised. Please give us your 2009 Form 1099-HC even if you had the same insurer in 2008.**
- **Federal Exclusions/Deductions not allowed for MA Income Tax.** The Federal exclusion for unemployment compensation, deduction for motor vehicle sales tax and exclusion for qualified principal residence mortgage indebtedness forgiveness are not allowed for MA Income Tax purposes.
- **Extended Federal Deductions not allowed for MA Income Tax.** The Federal extension for Tuition & Fees Deduction and Educators Deduction are not allowed for MA Income Tax purposes.

RI Income Tax Changes

- **Standard Deduction, Exemptions and Flat Rate-**The standard deduction and exemption amounts have been increased for 2009. The alternative flat rate has been reduced to 6.5%
- **Modifications changing Federal AGI-**RI has changed modifications increasing Federal AGI to include add backs for unemployment compensation, motor vehicle sales tax and discharge of business indebtedness under the ARRA of 09. A new modification reducing Federal AGI has been added for specific unreimbursed expenses incurred for human organ transplantation.-RI residents only.

E. P. Tremblay
and Associates, Inc.

Organizer Cover Letter

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Dear :

This Client Organizer is designed to help you gather tax information needed to prepare your 2009 personal income tax returns. We have preprinted certain information from your 2008 personal income tax returns to help you complete the organizer with minimal time and effort.

In your Client Organizer, all social security numbers and bank account numbers have been replaced with asterisks (***-**-****) and (****1234) to protect your privacy and personal information. If you need to change or update a social security number or bank account information, please provide the information on your organizer if you are hand delivering your documents. If you are mailing or emailing, please feel free to call and give us the information over the phone. When you receive your completed tax returns, please review all social security numbers and bank account information for accuracy. Report any discrepancies to this office immediately.

Enter 2009 information on the Client Organizer sheets provided. If any information does not apply to you or is incorrect, please draw a line through it or make the necessary corrections.

The Client Questionnaire asks about pertinent tax items necessary for preparing the most accurate tax returns possible. Please answer all applicable questions and attach a statement when necessary for additional information not provided in the Client Organizer.

We will also need the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 showing income from partnerships, S corporations, estates and trusts.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.

- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.

In order to meet the filing deadline for your 2009 income tax returns, your completed tax organizer needs to be received by our office no later than March 31, 2010. Any information received after that date may require an extension of time be filed for your return.

Thank you for the opportunity to serve you.

Sincerely,

E. P. Tremblay & Associates Inc.

Please use this slipsheet when sending your documents to E.P. Tremblay

From:

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To:

E. P. Tremblay & Associates Inc.
35 Bowker Terrace
Somerset, MA 02726

2009 Client Organizer

Engagement Letter

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Dear :

The purpose of this document is to promote mutual understanding and expectations with regard to the service that we provide to you in connection with preparing your tax returns. Please feel free to ask us to clarify any of the following statements.

We will prepare your 2009 federal and state income tax returns from information which you will furnish to us. We will provide you with questionnaires and worksheets to guide you in gathering the necessary information. If your information is incomplete or documentation is missing, we will complete as much of your returns as possible and will let you know by phone, mail or email what additional information is required to complete your returns. Please be aware that if an extension of time for filing is needed, we will need as much information and documentation as possible to estimate your final tax liability since this information is required for the extensions.

We expect that the information you are providing us is accurate and complete to the best of your knowledge and that you have evidence and records to support your data. We will not audit or verify the information except in cases where it is clear that the information or documents provided appear to be in error. We may ask for clarification of your data. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Federal & State Tax regulations require you to maintain documentation to substantiate data reported on your returns. It is important to have and maintain records to support items of data reported on your returns. Checks, bank statements, invoices, receipts, real estate settlement statements, brokerage statements and mileage logs are examples of these documents. It is also important to have and maintain records (statements, log books, etc.) to substantiate business use of auto, cell phone and personal computers. **It is our policy to return all original documentation (W-2s, 1099s, 1098s, K-1s, etc) to you with the client copy of your tax returns.** We do not generally keep copies of these documents (except the Federal copy of W-2s and some brokerage statements.) We recommend that you keep these documents for at least 7 years. Please let us know if you have any questions about requirements for documentation.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your tax returns are subject to review and audit by the IRS and State tax departments for a period of 3 years from the due date of the returns or the date filed, if later. If your returns are audited, we can assist you with the audit if you desire. Such additional service is not included in your tax preparation fee. If you receive a notice from the IRS or State Tax Dept. we encourage you to contact us so that we may help you with the appropriate response. Notices of changes and additional tax assessments are not always correct and should be verified.

If we prepare married filing joint returns, we will provide an additional copy of the return to either spouse upon request.

Our fees for tax preparation service are based on a number of factors such as the time required to complete the returns, the forms that we must prepare, and the additional service included in connection with the preparation of the returns such as future year tax projections and bookkeeping. It is our practice to adjust fees annually to keep pace with inflation.

Therefore, assuming that we are completing the same returns in about the same time as previous years, the fee for the current year will probably be slightly higher. If your fee is significantly higher than the previous year, it is because there was either a significant change in the forms that needed to be prepared or the amount of time it took to prepare the returns.

The fee for preparing your returns is determined upon completion of the returns. However, we will provide a fee estimate upon request. Payment of the fee for preparing your returns is due upon completion of the filing copies of your returns unless some other arrangement is made in advance. Fees unpaid more than 30 days beyond the due date are subject to interest of 1% per month.

Thank you for this opportunity to work with you.

Very truly yours,

E. P. Tremblay & Associates Inc.

Accepted By: ________________________________

Date: __________________

Our Privacy Policy

We collect nonpublic personal information about you from tax preparation worksheets and other documents we use in preparing your tax returns or other forms. We do not disclose any nonpublic personal information about you to anyone, except as authorized by you or as permitted by law.

If you decide to become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

We restrict access to your personal and account information to those employees who need to know that information to provide products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Your confidence in us is important and we want you to know that your personal and account information is safe. If you have any questions or concerns, please contact us.

E.P. Tremblay And Associates, Inc.
2009 Income Tax Questionnaire

Please check the appropriate box and include all necessary details.

Personal Information	Yes	No
Did your filing status (single, married, head of household) change in 2009?	p	p
If yes, explain: ____		
Did your address change from last year?	p	p
Can you be claimed as a dependent by another taxpayer?	p	p

Dependent Information

Were there any changes in dependents from the prior year?	p	p
If yes, explain: ____		
Do you have any children under age 18 with investment income in excess of $950?	p	p

Purchases, Sales and Debt Information

Did you start a new business or purchase rental property during the year?	p	p
Did you sell, exchange, or purchase any real estate during the year?	p	p
Did you acquire, sell, or withdraw any stock or mutual funds during the year?	p	p
Did you refinance a mortgage or take out a home equity loan this year?	p	p
If yes, please provide a copy of the loan closing settlement statement		
Did you sell an existing business, rental, or other property this year?	p	p

Income Information

Did you receive any income from property sold prior to this year?	p	p
Did you make any withdrawals from any type of Retirement plan?	p	p
Did you roll over any Retirement plan distributions received in 2009?	p	p
Did you make withdrawals from an Education IRA or 529 Plan Savings account?	p	p
Did you cash any U.S. Savings bonds?	p	p
Did you receive any state income tax refunds this year for any prior year?	p	p
If yes, how much $ ______ state: __________ $_________ state: _____		
Did you receive any tip income not reported to your employer?	p	p
Did you receive any distributions from Estates or Trusts in 2009?	p	p

Check here if you received a $250 Economic Recovery Payment paid to Soc. Sec., Railroad Retirement, SSI and Veterans Pension recipients in May 2009. p Taxpayer p Spouse

Check here if you received a pension or annuity in 09 for services perform as an employee of a US, State or local government from work not covered by Social Security p Taxpayer p Spouse

Deduction Information

Did you incur a casualty, theft or ponzi scheme loss during the year?	p	p
Do you have cancelled checks or receipts for all individual charitable contributions?	p	p
Did your employer provide an expense account or allowance during the year?	p	p
Did you use your car on the job, for other than commuting?	p	p
Did you have any unreimbursed work related expenses during the year?	p	p
Did you incur transportation or lodging expenses for work related overnight travel?	p	p
Did you have educational expenses or pay any student loan interest during the year?	p	p
Did you have any expenses related to seeking a new job during the year?	p	p
Did you use any part of your home exclusively for job or business?	p	p
Did you pay auto excise or city/town property tax on your auto during the year?	p	p
Amount paid in 2009 $_____(Do not include Real Estate Taxes)		
Did you make contributions to IRAs for the 2009 tax year?	p	p
Did you make direct contributions (not thru payroll) to Health Savings Accounts ?	p	p
Did you buy a Lean Burn, Hybrid, Alt. Fuel, Fuel Cell or Plug In vehicle in 09?	p	p

Deduction Information (Continued from Previous Page)

Question	Yes	No
Did you pay sales tax on a motor vehicle, motorcycle, aircraft, boat, home or home building materials in 09? If yes, please provide details incl. purchase date on M.V.	p	p
Did you donate a vehicle in 2009? If yes, form 1098-C must be issued by the Charity.	p	p
Did you install any energy saving improvements in your principal residence in 2009?	p	p
If <u>yes</u>, please provide us with details. Invoices and Efficiency Rating Info are helpful		
Did you incur Travel exp (trip >100Mi) related to Nat Guard/Reserves Service?	p	p
Did you pay Mortgage Insurance Premiums for a home purchased in 07, 08 or 09?	p	p
Did you remove lead paint or repair a septic system in 2009?	p	p
If filing in MA, did you pay rent for a home or apartment in MA for 2009?	p	p
If filing in MA, did you pay more than $150 for Fast Lane Tolls, MBTA Transit or commuter rail passes in 2009?	p	p
IF MA Resident-Did you have health insurance for 100% of your time living in MA?	p	p
If <u>no,</u> please provide information for those months you had coverage.		
If filing in RI, did you make contributions to the RI College Bound Fund in 2009?	p	p

Miscellaneous Information

Question	Yes	No
Did you sell or discontinue use as a principal residence, any home subject to first time homebuyer credit recapture?	p	p
Did you make gifts of cash or property of more than $13,000 to any individual?	p	p
Did you or your employer make contributions to a 401K or pension plan in 2009?	p	p
Did you incur moving costs because of a job change?	p	p
Did you adopt any children in 2009?	p	p
Did you pay anyone $1700 or more for housecleaning or childcare performed in your home in 2009? (If yes, you are required to pay the "Nanny Tax")	p	p
Did you receive correspondence from the State or the Internal Revenue Service?	p	p
If yes, explain: ____		
Do you want to allocate $3 to the Presidential Election Campaign Fund?	p	p
Do you have interest in or signature authority over an account in a foreign country?	p	p
Did you purchase any personal property in 2009 that is subject to use tax?	p	p

Estimated Tax (applies only if you make quarterly estimated tax payments)

Question	Yes	No
Did you pay Federal Estimated tax for 2009? *****	p	p
Did you pay State Estimated tax for 2009? What State(s) _____ ______ *****	p	p
*** Please provide us with the dates & amounts of estimated payments**		
Do you want any part of your refund applied to your 2010 estimated tax?	p	p
Do you want us to prepare your 2010 estimated tax vouchers?	p	p
Do you expect your income or deductions to change substantially in 2010?	p	p

Electronic Filing/Direct Deposit/Electronic Payment/Email

Check here if you <u>**do not**</u> want to file your p Federal or p State return electronically.

Question	Yes	No
Do you want your tax prep. fee deducted from your refunds *	p	p
***Republic Bank charges a $36 Processing Fee. You can pay by credit card to avoid this fee.**		
Do you want your refunds direct deposited to checking or savings?**	p	p
Do you want to have taxes due electronically withdrawn from checking or savings**	p	p
May we correspond with you, regarding your tax returns, via email?**	p	p

If yes, send email to p Taxpayer p Spouse or p Both

**** Please revise or add bank account and email address information on the appropriate organizer page.**

Question	Yes	No
May we send you our "Tax and Business Strategies" Newsletter via email***	p	p

***** View a sample by clicking the link at the bottom of our Tax Services page at <u>www.eptremblay.com</u>**

Other comments, questions, details? Please provide on a separate page

<u>Requests for information on other products & services offered by E.P. Tremblay</u>

Only check boxes for items that you would like us to provide you with additional information.

I'm interested in more information about help with installing & setting up Quickbooks software for my business financial record keeping.	p *
I'm interested in more information about bookkeeping and payroll services.	p *
I'm interested in more information about IRAs.	p *
I'm interested in more information about Tax Deferred Annuties.	p *
I'm interested in more information about Homeowners, Auto, Life, Disability, Long Term Care and Business insurance.	p *
I'm interested in more information about Real Estate Services.	p *
I'm interested in more information about Investment Services.	p
I'm interested in more information about Home Mortgages, New or Refinance.	p

If you have checked any boxes marked by an * (asterisk) please sign and return the "Consent To Use Tax Return Information" letter included with this questionnaire

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January 16, 2010

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CONSENT TO USE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. Tax return information shall include any and all personal and financial information located on your tax return.

You are not required to complete this form. If we obtain your signature on this form by making our offer of service contingent upon obtaining your consent, your consent will not be valid. Your consent is valid for the amount of time you specify. If you do not specify the duration of your consent, your consent is valid for one year.

For your convenience, E. P. Tremblay & Associates Inc. has entered into an arrangement with E.P. Tremblay and Sons Insurance Agency Inc. and/or E.P. Tremblay & Associates Inc. to provide specific services. To determine whether this service may be of interest to you, E. P. Tremblay & Associates Inc. may need to use your tax return information to determine if you are eligible.

If you would like E. P. Tremblay & Associates Inc. to use your 2009 tax return information to determine whether this service is relevant to you, initial next to the authorization declaration below and sign and date this consent to use your 2009 tax return information.

_____ I, authorize E. P. Tremblay & Associates Inc. to use the information I provide to E. P. Tremblay & Associates Inc. during the preparation of my 2009 tax return.

_____Insurance Products
_____Real Estate Services
_____Bookkeeping & Payroll Services

____

Taxpayer Signature:

____

Date Signed

Consent Valid Until: **One year from signature date (Cross out and write in another date, if desired)**

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Please feel free to contact us at 508-675-7557 if you have questions or would like more information regarding our privacy and confidentiality policies and procedures.

Form ID: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) ____[1]

Mark if you were married but living apart all year ____[2]

	Taxpayer	Spouse
Social security number	____[3]	____[4]
First name	____[5]	____[6]
Last name	____[7]	____[8]
Occupation	____[9]	____[10]
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	2 [11]	____[13]
Mark if legally blind	____[14]	____[15]
Mark if dependent of another taxpayer	____[16]	____[17]
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	____[18]	
Date of birth	____[21]	____[22]
Date of death	____[23]	____[24]
Work/daytime telephone number/ext number	____[25] ____[26]	____[27] ____[28]
Home/evening telephone number	____[29]	____[30]
Do you authorize us to discuss your return with the IRS? (Y, N)	____[31]	

Present Mailing Address

Address ____[35]

Apartment number ____[36]

City, state postal code, zip code ____[37] ____[38] ____[39]

In care of addressee ____[40]

Dependent Information

(*Please refer to Dependent Codes located at the bottom)

[41] First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months*** lived in your home	Dep Codes *	Dep Codes **	Care expenses paid for dependent

Name of child who lived with you but is not your dependent ____[42]

Social security number of qualifying person ____[43]

Dependent Codes

***Basic**	**1 = Child who lived with you**	****Other**	**1 = Student (Age 19 - 23)**
	2 = Child who did not live with you		**2 = Disabled dependent**
	3 = Other dependent		**3 = Dependent who is both a student and disabled**
	4 = Claimed under pre-1985 agreement		
	5 = Qualifying child for Earned Income Credit only		
	6 = Children who lived with you, but do not qualify for Earned Income Credit		
	7 = Children who lived with you, but do not qualify for Child Tax Credit		
	8 = Children who lived with you, but do not qualify for Child Tax Credit or Earned Income Credit		
*****Months**	**77 = Reported on odd year return**		
	88 = Reported on even year return		
	99 = Not reported on return		

Direct Deposit/Electronic Funds Withdrawal Information

If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter the following information:

Primary account:

Financial institution routing transit number ____________[1]
Name of financial institution ____________[2]
Your account number ____________[3]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*, 4 = US Series I Savings Bonds ($50 increments up to $5,000)) __[4]
Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[5]

Secondary account #1:

Financial institution routing transit number ____________[8]
Name of financial institution ____________[9]
Your account number ____________[10]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*, 4 = US Series I Savings Bonds ($50 increments up to $5,000)) __[11]
Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[12]

Secondary account #2:

Financial institution routing transit number ____________[15]
Name of financial institution ____________[16]
Your account number ____________[17]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*, 4 = US Series I Savings Bonds ($50 increments up to $5,000)) __[18]
Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[19]

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Client Contact Information

Preparer - Enter on Screen Contact

Taxpayer email address ____________[6]
Spouse email address ____________[7]

	Taxpayer	Spouse
Car telephone number	____________[8]	____________[15]
Fax telephone number	____________[9]	____________[16]
Mobile telephone number	____________[10]	____________[17]
Pager number	____________[11]	____________[18]
Other:	____________[12]	____________[19]
Telephone number	____________[13]	____________[20]
Extension	________[14]	________[21]

NOTES/QUESTIONS:

Form ID: RI

Rhode Island General Information

Mark if tax forms, instructions and booklet are not needed X [1]

Enter city or town of legal residence if different from that entered on Organizer Form ID:1040 ____ [2]

Use Tax

Description	Purchases Subject to Use or sales Tax	Sales Tax Paid to Other State
	[3]	[4]

Contributions

Amount of political and charitable contributions you wish to make to:

Political Contributions

Mark to make an electoral system contribution (NOTE: This will NOT increase your tax or decrease your refund) ____ [5]

If you wish for a for a portion of your electoral contribution to be paid to a political party, enter name of party ____ [6]

Charitable Contributions

Drug Program Account ____ [7]

Mark if you wish to make an Olympic Contribution ____ [8]

Organ Transplant Fund ____ [9]

Council on the Arts ____ [10]

Nongame Wildlife Fund ____ [11]

Childhood Disease Victims' Fund ____ [12]

Military Family Relief Fund ____ [13]

Part-year Resident Information

Part-year residency dates:

From ____ [14]

To ____ [15]

Property Tax Relief Claim

Mark if disabled and received social security disability payments during the tax year ____ [16]

Live in household or rent dwelling subject to property tax? (Y, N) ____ [17]

Current for property taxes and rent due in prior years? (Y, N) ____ [18]

Current for this year's property tax or rent and will pay unpaid installments? (Y, N) ____ [19]

Rent paid (Enter 100%) ____ [20]

If renting, name, address, and phone number of landlord: ____ [21]

____ [22]

____ [23] ____ [24] ____ [25]

____ [26]

NOTES/QUESTIONS: