

CHECKLIST FOR 2009 TAX RETURN

Below, we have listed the necessary documents required by us to process your tax return efficiently. Should you have any questions, please do not hesitate to give us a call.

- ❑ A copy of the previous years' tax return (if you are a new client to us, tax returns for years 2008 and 2007 would be preferable).
- ❑ All W-2 forms (original). A copy of the salary withholding tax forms if you had income in Japan.
- ❑ Copies of payment certificates for non-resident aliens.
- ❑ Copies of all 1099-MISC forms for your miscellaneous income.
- ❑ Copies of all 1099-INT forms for your interest income.
- ❑ Copies of all 1099-DIV forms for your dividend income. (Please make sure you include your spouse's accounts.)
- ❑ All documents showing your annuities & IRA receipt. (i.e. 1099-R)
- ❑ All documents if you refinance or sell your real property during 2009. (i.e. an escrow statement at purchase and/or sales which provide us dates and prices.)
- ❑ Provide us detailed information if you contribute to qualified organization.
- ❑ A copy of each 1098 form for your interest payments.
- ❑ A copy of the notification if you applied itemized deduction on 2008 tax return and received a notification of your tax refund (state tax, municipal tax) during 2009.
- ❑ A document showing your payment for estimated taxes during 2009.
- ❑ All vehicle registration forms or a copy of document showing payment for vehicle purchased during 2009.
- ❑ Property tax bills or documents showing the payment of property tax.
- ❑ Transaction statements showing your sales of marketable securities during 2009 (i.e. all the 1099-B forms)
- ❑ If you are enclosing us additional information, please provide us a brief explanation.
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We urge you to keep your receipts and other transaction statements for at least 3 years after filing your tax return.

Please make sure that you sign at the bottom of page 14.