

# Kelly's Tax Service

## Tax Worksheets

for Tax Year 2009

**We have improved the tax worksheets for 2009. As always, we have been staying current on the latest tax law changes so we can keep you informed on how these changes will affect your individual circumstances. And it is our desire to help you identify where these changes will benefit you; to do this we need you to carefully complete all of the questions in the attached questionnaire, worksheets, and bring all documentation with you to your appointment. Thank you in advance, for taking the time to fill out the questionnaire and worksheets.**

**Name:**  
 Taxpayer \_\_\_\_\_ SS No. \_\_\_\_\_ Birthdate/Age \_\_\_\_\_

Spouse \_\_\_\_\_ SS No. \_\_\_\_\_ Birthdate/Age \_\_\_\_\_

**Address:** \_\_\_\_\_ Telephone (Home) (\_\_\_\_) \_\_\_\_\_  
 Telephone (Work) (\_\_\_\_) \_\_\_\_\_  
 Cell Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Occupation:** Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

**Check One:**  Single  Married Filing Joint  Surviving Widow/Widower  
 Married Filing Separately (enter spouse's name/SS No. Above)  Unmarried Head of Household

Dependents Name	Birthdate/ Age	Social Security Number*										Relationship	No. of Months lived in your home in 2009

**\*A personal exemption is disallowed for any dependent unless the Social Security number is provided on the tax return.**  
 Members of your family attending college may make you eligible for a Hope Scholarship Credit, Lifetime Learning Credit, or Tuition and Fees Deduction. # Students \_\_\_\_\_

**Taxpayer:**  65 or over  Blind/Disabled **Spouse:**  65 or over  Blind/Disabled

**Estimated Tax Payments**

	1 <sup>st</sup> Quarter		2 <sup>nd</sup> Quarter		3 <sup>rd</sup> Quarter		4 <sup>th</sup> Quarter		TOTAL
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	
Federal									
State									
City									

**Wage Income**

**T = Taxpayer**

**S = Spouse**

Employer's Name	T or S	Wages		Federal W/H		FICA		Medicare		State W/H		City W/H	