

Retirement Benefits Received (Enclose all 1099R Forms)

Payer	T or S	Amount	Plan Type

Payer	T or S	Amount	Plan Type

Interest Income (Enclose all 1099-INT Forms)

T = Taxpayer

S = Spouse

Payer	T or S	Amount	Seller Financed Mortgage		Early Withdrawal Penalty		Tax Exempt (Y or N)

Total Municipal Bond Interest Earned in 2009: \$ _____

For seller financed mortgage: Buyer's name, Social Security number and addresses: _____

Dividend Income (Enclose all 1099-DIV Forms)

T = Taxpayer

S = Spouse

Payer	T or S	Total Dividend	Qualified Dividend		Capital Gain Dist.	

Do you have funds in a foreign account? Yes No

Did you have any stock sales in 2009? If yes, submit all 1099B forms. Yes No

Installment Sale Payments Received: Interest \$ _____ Principal \$ _____

Buyer's name: _____ SS # _____ Address: _____

Other Benefits/Income Received (Enclose all 1099, SSA-1099, K-1s and other Misc. Forms)

	Social Security		Unemployment		Alimony		State Refund		Other	
Taxpayer										
Spouse										