

2008 SEPARATOR SHEETS

W-2's

Paper clip all W-2's to this cover sheet

1099-INT

Paper clip all 1099's from banks and other institutions issuing 1099-INT

1099-DIV

Paper clip all 1099's from your brokerage accounts (Fidelity, Schwab, Morgan Stanley, E-trade, Ameritrade, Sharebuilder.com, Citigroup, insurance companies, Vanguard, Janus, etc)

Include any 1099B forms not incorporated into your consolidated package)

1099R
&
SSA-1099

Paper clip all forms from retirement accounts, etc that say 1099R and the SSA-1099 from Social Security if you collect SS income

Rental Property

Fill out the following organizer if you rent any real estate – if more than one property, make copies of the attached as needed

Self Employed

If you have your own business you must fill out the Schedule C self employment worksheet

Deducting your car

If you use your own car in your self employed business, or if you are an employee and use your own car for business use, you must complete the Vehicle deduction worksheet

Donations

All donations must be supported by a cancelled check or a receipt or letter from the charity. If you donate clothes or other property, we must see the receipt, or no deduction.