



ANTHONY J. FASO, CPA

An Accountancy Corporation

Thank you for visiting our website!

Please use the following pages as a guide to gather your tax documents for preparation of your income tax return. Additionally, please provide us with the following information:

- A copy of your last year's tax return,
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Auto registration fees or license plate numbers for each vehicle
- Closing statements pertaining to real estate transactions
- Sales contract for the purchase of a car, truck, boat, RV or ATV
- Any tax notices received from the IRS or other taxing authorities

In an effort to expedite the preparation of your tax return, once you have gathered all your tax information, please drop off the package (with your various tax forms) to our office. This will allow us to review your package, begin your return, and call you if there are further questions or items needed. When your return is completed by our office, we will call to make arrangements for you to pick up your return.

Filing deadlines are as follows: **Individuals - April 15th, Corporations - March 15th.** If you require an extension, please e-mail us at Anthony@fasocpa.com, and we will file one for you. **If we do not receive your package by April 1st, we will not be able to complete your return by April 15th, but we will gladly file an extension for you.**

****Note, if you do choose to file an extension, any taxes owed are still due by April 15th.**

As a partner in your financial success, I am very excited to announce that I have been licensed as a Nevada Insurance Agent for Life and Health insurances. Looking into the future, there are many products, services, and strategies available that can increase your financial security by adding to both your personal and business wealth. Some areas I can help you are:

- Asset Protection Strategies
- Income Protection during disability
- Long Term Care programs
- Family Banking System – taking charge of your financial future by becoming your own personal banker. You can learn more about the Family Banking System at my associate, Joe Pantozzi's website: familybankingsystems.com.
- Life Insurance – we can help you make sense of the spectrum of products and help you discover the best way to provide lifelong security for your family, protect your business, secure your independence, and leave a legacy.
- Provide you information through workshops, newsletters, e-mail, webinars, and private meetings.

We thank you for your business and we look forward to hearing from you soon. Please contact us if you need further assistance.

Sincerely,

Anthony J. Faso, CPA

Please complete this questionnaire for 2009, and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2009, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900? |

PURCHASES, SALES, AND DEBT

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business, purchase rental or royalty property, or acquire an interest in a partnership, S corporation or, trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell any stocks, bonds, or other investment property in 2009? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or take a home equity loan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, fuel cell property, or improvements? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to receive information about converting an IRA to a Roth IRA? There is no income limitation to convert to a Roth IRA in 2010. |

2009

1040

US

Miscellaneous Questions**EDUCATION**

- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

- Did you incur a loss because of damaged or stolen property?
- Did you purchase (not lease) an automobile, boat or RV?
- Did you donate any non-cash items to charity that totaled over \$500?

ESTIMATED TAXES

- Did you make any estimated payments for 2009?
- If you have an overpayment of 2009 taxes, do you want the excess applied to your 2010 estimated tax (instead of being refunded)?
- Do you expect your 2010 taxable income and withholdings to be different from 2009?

MISCELLANEOUS

- Do you want to electronically file your tax return?
- Did you have an interest in or authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you or your spouse elect to receive COBRA continuation health coverage (35% of premium) between February 17, 2009 and December 31, 2009 as a result of an involuntary termination?
- Do you and your spouse have life insurance?
- Would you like help in calculating the appropriate amount of life insurance you should have and/or can qualify for?
- Do you and your spouse have disability insurance?
- Would you like to learn more about disability insurance and the various plans that are available for your particular circumstances?

FAMILY BANKING SYSTEM

- Would you like more information on how you can finance your next car or other purchases thru your own Family Bank, rather than conventional finance companies?