

Happy 2010!

It's time to start thinking about your tax appointment. Once again, this new year again brings numerous changes as the federal and state governments try to stimulate the economy and keep themselves afloat. You're going to see some new forms and new questions this year. Even the good ol' "standard" deduction now requires its own form (new Schedule L) for many clients. The enclosed questionnaire will help. Please complete the form and bring it to your appointment.

We've had a few changes ourselves this year. John Fritsch joined CAYATAX this year as an associate preparer. Mary Hofer, our great bookkeeper is working more hours, and of course my wife Lisa (and Buckley) will be here as well. We also expanded our office to make a quieter waiting area and added a new client meeting room.

Please contact us to set your appointment. If you are mailing your return, please let us know. We will contact you when it arrives. New this year, you can also pick from available appointment times at our website www.cayatax.com. Also check out the website for hundreds of tax articles, appointment organizers, tools and forms.

We look forward to seeing you!

Sincerely,



Frederick J. Caya, EA, ATP

Enrolled to Practice Before the Internal Revenue Service

Call for your appointment: LOCAL 784-2292 TOLL-FREE 1-877-816-6800
New this year - go to www.cayatax.com and select your own appointment time!

Appointment Date:

Time:

Available Appointment Times - Mon - Fri 9a - 5p (some Saturday mornings, please call if needed)

BE SURE TO ASK FRED ABOUT...(write your questions here)

TAX APPOINTMENT WORKSHEET

This worksheet is not intended to be all-inclusive. Many more items may affect the results of your tax return. Bring or discuss any item which affected your financial situation this year. For more information, call me or go to www.cayatax.com.

Name (Both if filing jointly): _____

Current E-mail Address: _____

Providing your current e-mail address helps us keep you updated during the year to any tax law changes which could effect you before next years filing season. Please see our Privacy Policy (online and by request) to see how we use your e-mail address.

Event / Item	Y/N	Notes
Any family changes? (birth, adoption, death, marriage, divorce)		
Did you support anyone other than your minor children?		
Did anyone provide support for you or your spouse?		
Was anyone permanently disabled in your household this year?		
Did you purchase a new (or used) vehicle? Other large purchases?		
Did anyone change jobs during the year?		
Did you change addresses and/or purchase a new house? (if so, bring the closing stmt to your appointment)		
Are you or anyone you know currently looking to purchase a new home? (tax credits end soon!)		
Did you make any energy efficient improvements to your home?		
What dates did you make payments on your house taxes?		
Did you receive any Debt Forgiveness? Explain...		
Did you start a business, end a business, or rent out any of your property ?		
Did you sell anything? (stocks, U.S. savings bonds, real estate, collectables, business assets, etc...)		
Do you have any stocks which went WORTHLESS?		
Did you receive any gambling winnings, contest prizes, or jury duty pay?		
Did you travel out of town for work, medical, or charitable reasons?		
Did you trade business items or services with anyone? (i.e. bartering)		
Did you earn any interest which you didn't get a statement?		
Did you have any personal or business losses due to theft or casualty (i.e. storm damage, flooding, etc...)?		
Do you have Health Insurance? How do you pay for it?		
Do you or your spouse have an IRA or other retirement account? Did you contribute or withdraw any money to/from those accounts?		
Do you have a Traditional IRA and want to talk about converting it to a ROTH IRA?		
Did you, a spouse, or a child attend college or any other post-secondary school?		
Do you use your personal vehicle for work (besides driving to and from work)?		
Are you provided a vehicle by your employer?		
Did you make any gifts to any individuals over \$13,000? (This may include signing over your home or other property to a family member.)		
Do you have any household employees? (child care, housework, nursing, etc...)		
Do you pay child care expenses, regardless of in your home or their location?		
Do your minor children (up to age 24) have savings or investments which earn current income? (interest, dividends or sales of stock)		
Did you make Estimated Tax Payments this year? If so, be sure to bring a record of all payments.		

OTHER ITEMS / EVENTS / QUESTIONS...