TAXWORKS
PROFESSIONAL TAX SOFTWARE

Tax**Works** Conversions **2009**

Welcome to TaxWorks

Thank you for choosing TaxWorks Professional Tax Software. We are excited to have you on our team and look forward to building a lasting relationship together.

As you make the transition to TaxWorks, we want to ensure that everything runs as smoothly as possible. The first step of this transition will be converting your clients from ATX to TaxWorks. This document contains step-by-step instructions on converting your clients. Please read through it carefully.

We have also included a section noting the specific fields for each form that is converted to each TaxWorks system. The form information is lengthy and is intended for reference purposes only. You needn't read it in its entirety. Information is documented for systems 1040. The systems 1041, 1065, 1120, and 1120S are scheduled to be released approximately 12/015/10.

If you require assistance during the conversion process, please don't hesitate to contact our support team at 1-800-843-1139. Again, welcome! We look forward to working with you.

Sincerely,

TaxWorks Professional Tax Software

Table of Contents

Disclaimer Statement

The goals of the TaxWorks data conversion are as follows:

1. To convert the ATX data to the TaxWorks format you will need to run Update Clients which transfers your 2009 TaxWorks data to 2010 TaxWorks.

2. To update the 2009 ATX data to 2010 TaxWorks format that will allow you to generate complete and accurate Tax Organizers.

The data conversion is NOT intended to do the following:

1. It is NOT intended to convert all of your data.
2. It is NOT intended to allow you to generate a complete and accurate 2009 TaxWorks tax return.

   NOTE: *Do not process/prepare 2009 tax returns using only the converted information, as tax calculations may not be accurate. Some manual data entry may be required.*

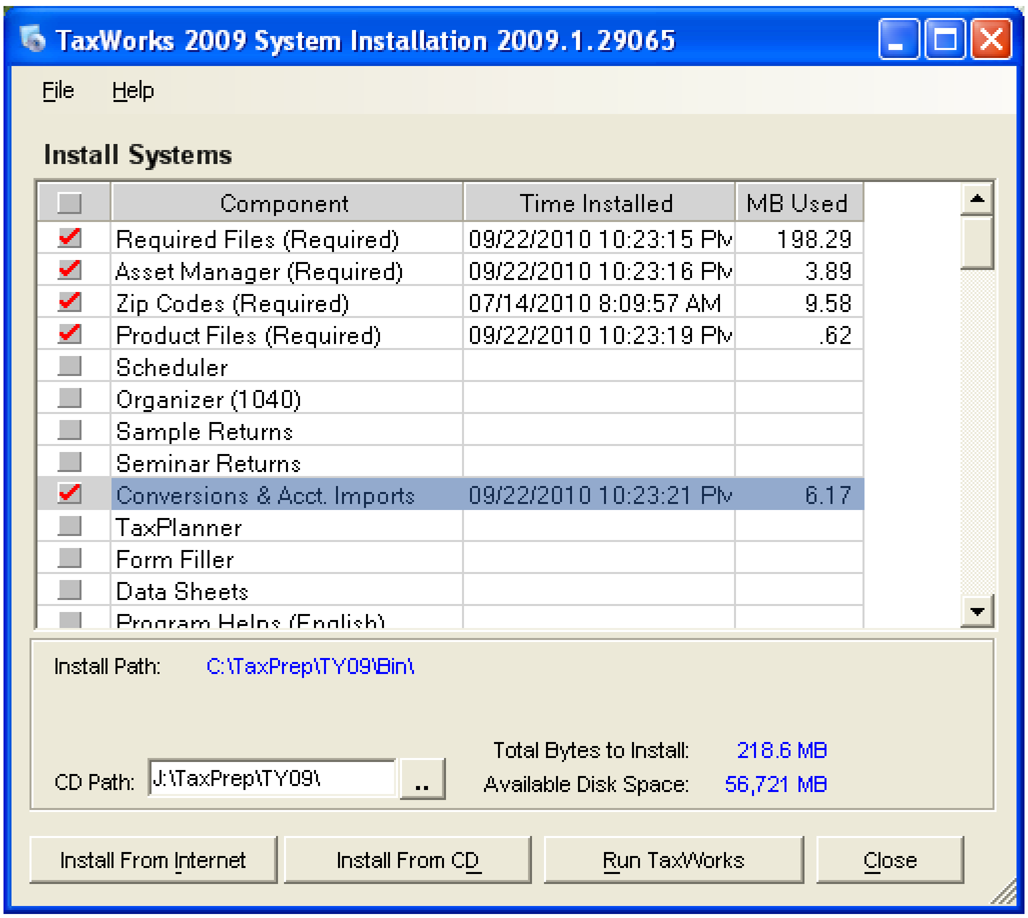
Individual Conversions

Note: *TaxWorks only converts information necessary to prepare a Proforma and Taxpayer Organizer.*

- Items selected for deletion for next year may not be taken into account. You may have to manually remove some items after updating to TaxWorks 2009.
- All Grids – Due to formatting of ATX, grids may not be accurate when converted. Not all grids will convert. Verify information that converted and make any necessary adjustments.
- Most calculated fields cannot be converted. Overrides of many of these fields will convert.
- On occasion overridden fields in ATX returns will not be converted. Instead, underlying calculated values, if present, will be converted if your ATX return contained overridden fields. Review the converted values in 1040Works to ensure the proper values are present.
- TaxWorks 2009 Taxpayer Organizer – Will be available December 2010.

Conversion Process

1. As a precaution, backup your client data in your 2009 software package.
2. Install the TaxWorks 2009 Demo (follow the installation instructions provided with the demo).
    a. If you do not have a copy of the demo call our Sales Team at (800) 230-2322.
    b. After installation is complete, open the TaxWorks 2009 Demo by clicking the *TaxWorks icon* located on your desktop.
3. If the Client Selection screen appears, click *Close*.
4. On the menu bar click *Installations*, and then *Upgrade Systems*.



5. Tag the following items using your mouse. Do this by clicking on the gray box to the left of the item:
    a. All required installations
    b. Conversions & Acct Imports

6. Tag only the Federal systems for clients you wish to convert:

a. Federal 1040 Individual

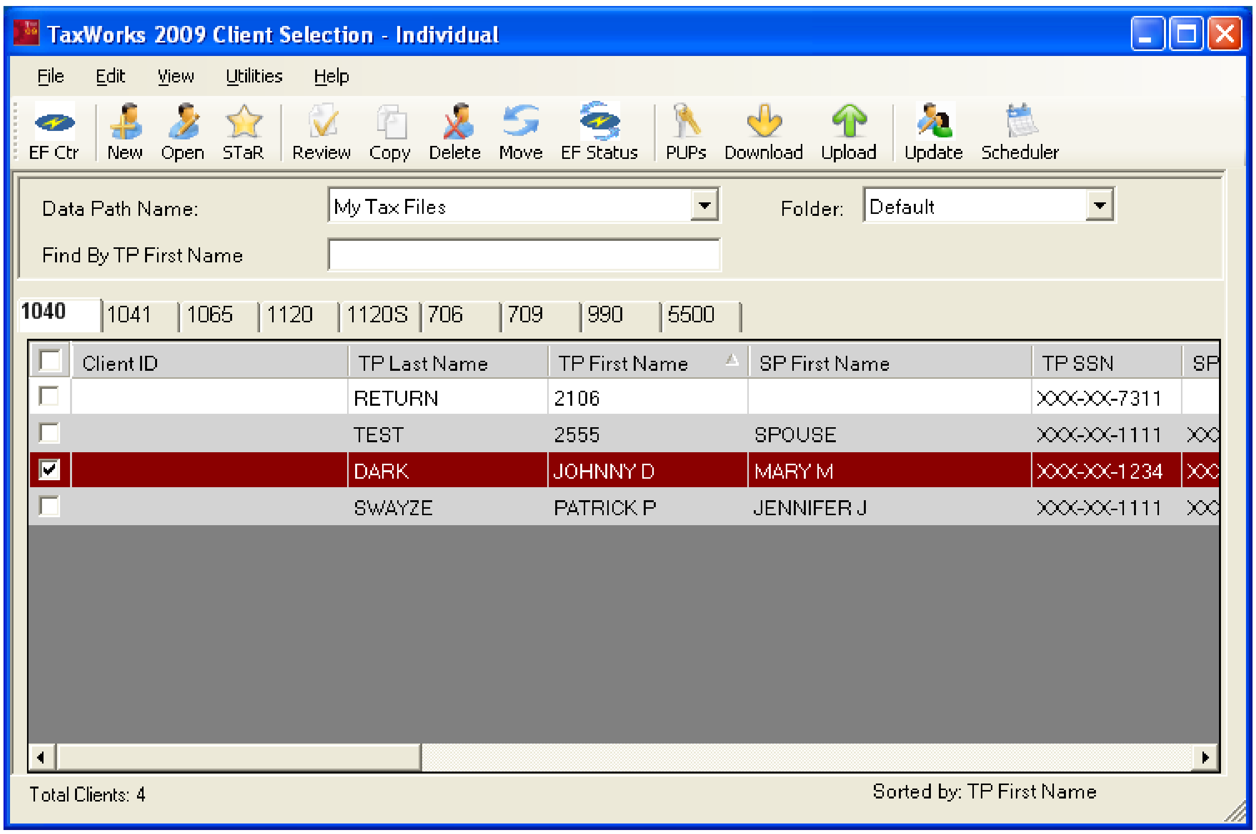
b. Federal 1041 Fiduciary

c. Federal 1065 Partnership

d. Federal 1120 Corporation

e. Federal 1120S S-Corporation

7. Click *Upgrade From Internet* (Upgrades may take up to 1 hour).
8. Once upgrade is complete, click *Close*.
9. Files that were upgraded will automatically decompress.
10. TaxWorks 2009 will automatically open.
11. If the Client Selection screen appears, close it by clicking the *Red X.*

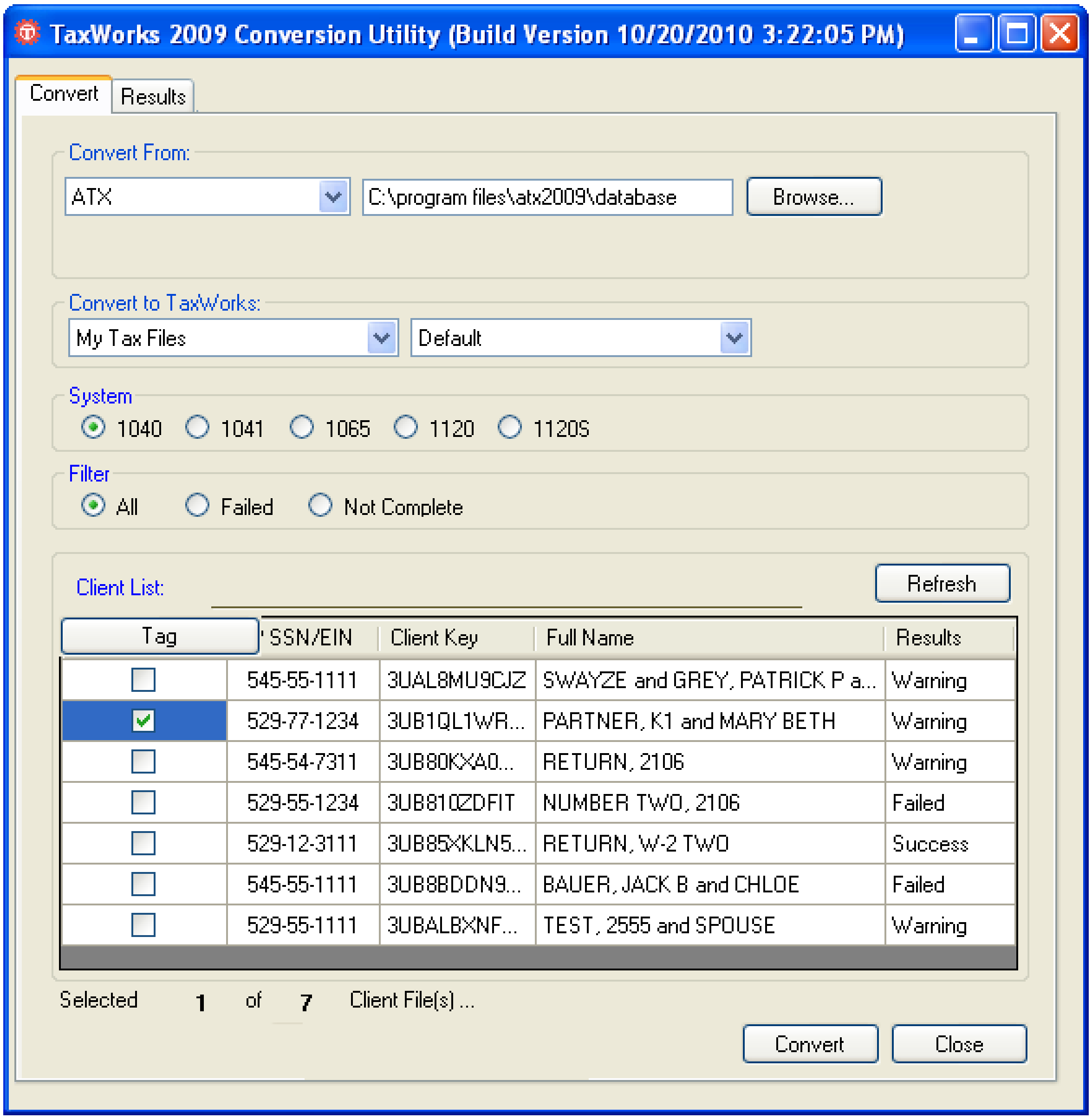


12. Click *File* tab and click *Convert Clients*.
13. TaxWorks will automatically close.
14. The TaxWorks 2009 Conversion Utility will open.
15. Verify ATX Data Path:

C:\program files\atx2009\database

Note: *Vendor Data Path will change with system selected at the bottom of the screen.*

16. Select the TaxWorks Data Path (default is MY TAX FILES).
17. Select the TaxWorks Folder (default is DEFAULT).
18. Tag clients you want to convert. To Tag all clients click Tag.
19. Click *Convert*.



20. Once the conversion is complete, the status of each client will be displayed in the Status column.
21. To view a conversion report. Click the *Results* tab.
22. When finished click *Close.*
23. TaxWorks 2009 will automatically open.
24. If the Client Selection window does not open automatically click the *Clients* button located on the button bar.

25. Carefully review your converted data files to be sure your converted data is accurate. To open the return double click on the desired client file; or highlight the desired client and click *Open*. If you have items that did not convert, manually enter them in the TaxWorks program.
26. If you have any questions or suggestions concerning the conversion process please contact us at support@taxworks.com or call (800) 843-1139.
27. Occasionally we will upgrade items in the conversion program. We will post upgrade changes on the web. You may reconvert clients affected by these changes.

CAUTION*: Entries made in TaxWorks to previously converted clients will be lost.*

ATX® to TaxWorks®
Individual (1040) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the TaxWorks tax program. The **underlined and bold** titles are the sub-titles within each input screen.

GI – General Info - Advanced

General Information

Taxpayer First Name and Initial
Taxpayer Last Name
Taxpayer Title / Suffix
Taxpayer Social Security Number
Taxpayer Occupation
Taxpayer Birthdate
Taxpayer Blind
Permanent Disabled
Taxpayer Death Date
Taxpayer Home Phone Daytime / Evening
Taxpayer Work Phone Daytime / Evening
Taxpayer Cell Phone
Taxpayer Fax Number
Taxpayer Pres Elect Campaign
Taxpayer Tuition and Fees
Taxpayer AOC Expenses
Spouse First Name and Initial
Spouse Last Name
Spouse Title / Suffix
Spouse Social Security Number
Spouse Occupation
Spouse Birthdate
Spouse Blind
Permanent Disabled
Spouse Death Date
Spouse Home Phone
Spouse Work Phone
Spouse Work Phone
Spouse Cell Phone
Spouse Fax Number
Spouse Pres Elect Campaign
Spouse Tuition and Fees
Spouse AOC Expenses

Address, County and School

Address
Apartment Number
Zip, City, State
Taxpayer E-mail Address
Spouse E-mail Address

Foreign Address (If Required)

Foreign Street Address
City
State or Province
Postal Code
Country

Filing Status

Single
Check if Taxpayer Can Be claimed on Someone Else's Return)
Joint
Married filing Separate
Didn't live with Spouse all year
Head of household
Qualifying Widow(er)
Year Spouse Died

DI – Dependents

Dependent Information

First Name
Last Name
Birthdate
Social Security Number
Relationship
Months Lived at Home
Disabled
Student

1 – 1040 Pg1

U.S. Individual Income Tax Return, Page 1

Income

Household Emp Income Not Reported on W-2
Taxable Graduate Scholarship-fellowship Amount
Qualified Dividends
Alimony Received – Taxpayer
Alimony Received – Spouse
IRA Distribution
IRA Distribution – Tax Amount
Pensions / Annuities

Pension / Annuities – Tax Amount
Other Income:
Personal Property Rental Income
Jury Pay
Alaska Permanent Fund Dividend
Other Income

Adjustments

Educator Expenses – Taxpayer
Educator Expenses – Spouse
Alimony Paid
Tuition and Fees Deduction

1 – 1040 Pg2

U.S. Individual Income Tax Return, Page 2

Refund

Amount of Refund to Apply to 2010
Preparer is Third Part Designee
Name
Phone Number
Personal ID Number

W2 – Wage W2

Wages and Tax information

Ownership Code (T,S)
Employee Name (if different)
Employee Address (if different)
Employee City, State, ZIP (if different)
Employer's ID Number
Employers Name
Employer's Name
Employer's Address
Employer's ZIP, City, State
Wages, Tips, Other Compensation
Federal Income Tax Withheld
Social Security Wages
Social Security Tax Withheld
Medicare Wages and Tips
Medicare Tax Withheld
Social Security Tips
Allocated Tips
Advanced EIC Payment
Dependent Care Benefits
Nonqualified Plans
Box 12a
Box 12b
Box 12c
Box 12d
Retirement Plan
Third-Party Sick Pay
Other
Non-standard Indicator
Corrected Form W-2
State Name
State ID Number
State Wages
State Tax Withheld
Local Wages
Local Tax
Locality Name

W2G – Gambling W2

Certain Gambling Winnings

Ownership Code (T,S)
Winner's Name (if different)
Winner's Street Address (if different)
Winner's City, State, Zip (if different)
Payer's Name
Payer's Federal ID Number
Payer's Address
Payer's Zip, City, State
Gross Winnings
Federal Income Tax Withheld
Date Won
Transaction
Race
Winnings from Identical Wagers
Cashier
Window
First ID Number
Second ID Number
Two-Letter State Code
Payer's State ID Number
State Tax Withheld

1099G – Govt Payments

Government Payments

Ownership Code (T,S)
Recipient's Name (if different)
Recipient's Street Address (if different)
Recipient's City, State, ZIP (if different)
Federal ID Number
Payer's Name

Payers Address
Payers ZIP, City, State
Payer's Telephone Number
Unemployment Compensation
Amount Repaid
State/Local Income Tax Refunds, Credits
Box 2 Amount is for Tax Year
Federal Income Tax Withheld
ATAA Payments
Taxable Grants
Agricultural Payments
Amount in Box 2 Applies to Income from Trade
1st State Tax Withheld
1st State
1st Payer State No

1099M – Misc Income

Miscellaneous Income

Ownership Code (T,S)
Recipient's Name (if Different)
Recipient's Street Address (if Different)
Recipient's ZIP (if Different)
Federal ID Number
Payer's Name
Payer's Address
Payer's ZIP, City, State
Account Number
Rent
Royalties
Other Income
Federal Income Tax Withheld
Fishing Boat Proceeds
Medical and Health Care Payments
Nonemployee Compensation
Substitute Payments
Payer Made Direct Sales of $5,000
Crop Insurance Proceeds
Excess Proceeds Paid to an Attorney

1st State

State
State Tax Withheld
Payer State Number
State Income
Local Tax Withheld
Locality Name
Local Distribution

2st State

State
State Tax Withheld
Payer State Number
State Income
Local Tax Withheld
Locality Name
Local Distribution

1099R – Pensions

Distributions from Pensions, Annuities, Etc

Ownership Code (T,S)
Payee's Name (if different)
Payee's Street Address (if different)
Payee's ZIP, City, State (if different)
Federal ID Number
Foreign Address
Payer's Name
Payer's Address
Payer's ZIP, City, State
Account Number
Gross Distribution
Taxable Amount
Taxable Amount Not Determined
Total Distribution
Capital Gains Included in Line 2a
Federal Income Tax Withheld
Employee Contributions
Net Unrealized Appreciation in
Employer's Securities
Distribution Code
IRA/ SEP/ SIMPLE
Other
Percent
Percent Total Distribution
Total Employee Contribution
Nonstandard Indicator
1st and 2nd State
1st State Tax Withheld
1st and 2nd State Payer State Number
1st and 2nd State Distribution
1st State Local Tax Withheld
1st and 2nd State Locality Name
1st and 2nd State Local Distribution

Taxable Pension Calculation Using the Simplified Method

Cost in Plan at Starting Date
Age at Starting Date
Amount Received Tax Free after 1986
Annuity Starting Date
Number of Months Payments Were Made

RET – Retirement Contributions

Retirement Contributions

Traditional IRA

Taxpayer
- IRA Contributions
- Covered by Retirement Plan

Spouse
- IRA Contributions
- Covered by Retirement Plan

Roth IRA

Taxpayer
- Roth IRA Amount actually contributed 2009

Spouse
- Roth IRA Amount actually contributed 2009

SSA - Social Security Benefits

Social Security and Tier 1 Railroad Benefits

Taxpayer – Total Social Security Benefits
Taxpayer – Total Medicare Premiums Pd
Taxpayer – Drug Premiums (Part D) Paid
Taxpayer – Total Tier 1 Railroad Benefits
Taxpayer – Federal Income Tax Withheld

Spouse – Total Social Security Benefits
Spouse – Total Medicare Premiums Pd
Spouse – Drug Premiums (Part D) Paid
Spouse – Total Tier 1 Railroad Benefits
Spouse – Federal Income Tax Withheld

A - Schedule A

Itemized Deductions

Medicine and Drugs
Medical Insurance
Medical Miles
Long-Term Care Premiums – Taxpayer
Long-Term Care Premiums – Spouse
Other Medical Expenses
State and Local Income Taxes
Real Estate Taxes
Personal Property Taxes
Foreign Income Taxes Paid
Other Taxes
Home Mortgage Interest Reported on 1098
Mortgage Interest Not Reported on 1098
Points Not Reported on 1098

Qualified Mortgage Insurance Premiums
Investment Interest
Contributions by Cash or Check
Total Charitable Mileage
Contributions Other than Cash or Check
Union and Professional Dues
Other Unreimbursed Expenses
Tax Return Preparation Fees
Investment Expense
Safe Deposit Box
Other Limited Expenses
Gambling Losses
Other Miscellaneous Deductions

B – Schedule B

Interest and Ordinary Dividends

Interest Income

Interest Income Description
Account Number
T,S,J
Interest Income (Not US Govt)
Early Withdrawal
US Govt Savings Bond
Tax-exempt (Muni Bonds)
Issuing State
Specified Priv Act Incl
Federal Withholding
Payer's EIN
Investment Expense
Foreign Tax Paid
Foreign Country or US Possession

Dividend Income

Dividend Income Description
Account Number
T,S,J
Total Ordinary Dividends
Qualified Dividends
Total Capital Gains
(28%) Collectibles
Unrecap Sec 1250

Sec 1202 Gain
Nondividend Distributions
Cash Liquidating
Non-Cash Liquidating
Investment Expense
Foreign Tax Paid
Foreign Country or US Possession
Federal Withholding

C – Schedule C

Schedule C – Profit or Loss from Business

Business Owner – T,S,J
Principal Business Including Product
Principal Business Code
Business Name
Employer Identification Number
Street address (if different)
City, State, ZIP (if different)
Accounting Method –
(Cash, Accrual, Other, Specify)
'Materially Participate' in Business this Year
First Schedule C Filed for this Business

Part I – Income

Gross Receipts or Sales
Statutory Employee
Returns and Allowances
Cost of Goods Sold
Other Income

Part II – Expenses

Advertising
Car / Truck Expense
Commissions
Contract Labor
Depletion
Depreciation
Employee Benefit Program
Insurance
Interest:
Mortgage
Other
Legal / Professional Services
Office Expense
Pension / Profit Sharing
Rent or Lease:
Vehicles, Machinery, Equip
Other Business Property
Repairs / Maintenance
Supplies
Taxes and Licenses
Travel
Meals and Entertainment:
(Limited 50%)
(100% Deductible)
Utilities
Wages (Less Empl Cr)

Part III – Cost of Goods Sold

Methods Used (Cost, Lower of Cost or Market, Other, Specify)
Beginning Inventory
Purchases
Cost of Labor (Not Paid to Self)
Materials and Supplies
Other Costs
Inventory at End of Year

Part IV – Information on Your Vehicle

Date Vehicle Was Placed in Service
Total Number of Miles Vehicle Was Used For:
Business
Commuting
Available for Use During Off-hours?
Another Vehicle Available for Personal Use?
Have Evidence to Support Deduction?
If Yes, Is the Evidence Written?

Part V – Other Expenses

Other Expenses

D – Schedule D

Capital Gains and Losses

1099 Transactions Prop Desc
T,S,J
Acquired Date
Sold Date
Term
Sales Price
Cost or Basis

E – Schedule E pg 1

Rental Real Estate and Royalties

Property Kind
Location – Street Address
Zip, City, State
Entity Ownership (T,S,J)
Real Estate Professional
Exempt from Limitation
Percentage of Ownership (if not 100%)
Personal Use for 14 Days or 10%
Rents Received
Royalties Received
Advertising
Other Travel Expense
Cleaning and Maintenance
Commissions
Insurance
Legal and Other Professional Fees
Management Fees
Mortgage Interest Paid to Banks Etc
Other Interest
Repairs
Supplies
Taxes
Utilities
Other
Depletion

ES – Estimates

Estimated Tax

1st Quarter Voucher Payment Date
2nd Quarter Voucher Payment Date
3rd Quarter Voucher Payment Date
4th Quarter Voucher Payment Date
1st Quarter Payment Amount
2nd Quarter Payment Amount
3rd Quarter Payment Amount
4th Quarter Payment Amount
Amount Paid with 2009 Extension

PTK1 – PT K1 Recd

Partnership Schedule K-1 Received

Entity Ownership (T,S,J)
Partnership Identification Number
Partnership Name
Partnership street address
Partnership ZIP code (City, State, ZIP)
Publicly Traded Partnership
General Partner
Real Estate Professional
Active Rental Real Estate
Foreign Partnership
Final Disposition

Income or Loss

Ordinary Business Income or (Loss)
Net Rental Real Estate Income or (Loss)
Other Net Rental Income or (Loss)
Guaranteed Payments to Partner
Interest Income
Interest on US Government Obligations
Ordinary Dividends
Qualified Dividends
Royalty Income
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
Collectibles (28% Rate) Gain (Loss)
Unrecaptured Section 1250 Gain
Net Section 1231 gain – From Business Activities
Other Income or (Loss)

Section 179 Expense

Section 179 Expense Deduction
Section 179 Carryover from Prior Year

Other Deductions

Self-Employment Earnings (Loss)

Net Earnings from Self-employment – Nonfarm
Net Earnings from Self-employment – Farm
Gross Farming or Fishing Income
Gross Nonfarm Income

Credit and Credit Recapture

Foreign Transactions

Total Foreign Taxes Paid

Alternative Minimum Tax (AMT) Items

Tax – Exempt Income and Nondeductible Expenses

Distributions

Distributions of Money
Distributions of Property Other Than Money

Other Information

CSK1 – CS K1 Recd

S Corporation Schedule K-1 Received

Entity Ownership (T,S,J)
S Corporation Identification Number
S Corporation Name

Income or Loss

Ordinary Business Income or (Loss)
Net Rental Real Estate Income or (Loss)
Other Net Rental Income or (Loss)
Interest Income
Interest on US Government obligations
Ordinary Dividends
Qualified Dividends
Royalties
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
Collectibles (28% Rate) Gain or (Loss)
Unrecaptured Section 1250 Gain
Net Section 1231 Gain (Loss)
From rental Real Estate Activities
Other Income or (Loss)

Real Estate Professional
Active Rental Real Estate
Final Disposition

Section 179 Expense

Section 179 Expense Deduction
Carryover of Section 179

Other Deductions

Credit Recapture

Foreign Transactions

Total Foreign Taxes Paid

Alternative Minimum Tax (AMT) Items

Items Affecting Shareholder Basis

Other Information

FDK1 – FD K1 Recd

Fiduciary Schedule K-1 Received

Beneficiary Ownership Code
Estates or Trusts Identification Number
Estates or Trusts Name

Fiduciary Street Address
Fiduciary ZIP Code (City, State, ZIP)

Income or Loss

Interest Income
Interest on US Government Obligations
Ordinary Dividends
Qualified Dividends
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
28% Rate) Gain (Loss)
Unrecaptured Section 1250 Gain
Other Portfolio Income

Ordinary Business Income
Net Rental Real Estate Income
Other Rental Income
Directly Apportioned Deductions
Estate Tax Deduction
Final Year Deductions
Alternative Minimum Tax Items
Credits and Credit Recapture
Other Information

F – Schedule F

Farm Income and Expense

Spouse's Schedule F
Principal Product
Agricultural Activity Code
Employer ID No
Taxpayer Materially Participates

Part I – Farm Income (Cash Method)

Sale - Livestock and Other Items Bought for Resale

Cost - Livestock and Other Items Reported on Line 1
Sales of Livestock, Produce, Grains and Other Products Raised
Total Cooperative Distributions Amount (1099-PATR)
Taxable Cooperative Distributions Amount: Taxable Amount
Agricultural Program Payments:

Taxable Amount
Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported Under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds and Crop Disaster Payments:
Amount Received in 2009
Taxable Amount
Elect to Defer to 2010
Amount Deferred from 2008
Custom Hire (Machine Work) Income
Other Income

Part II – Farm Expense Cash and Accrual

Car / Truck Expense
Chemicals
Conservation Expense
Custom Hire
Employee Benefit Program
Feed Purchased
Fertilizers and Lime
Freight and Trucking
Gasoline, Fuel and Oil
Insurance (Not Health)
Interest:
Mortgage Paid to Banks
Other
Labor Hired Less Employment Credits
Pension/Profit Share
Rent or Lease:
Machinery and Equipment
Other (Land, Animals)
Repairs and Maintenance
Seeds and Plants
Storage / Warehousing
Supplies Purchased
Taxes
Utilities
Vet, Breeding, Medicine
Other Expenses

Part III – Farm Income Accrual Method

Sales of Livestock, Produce, Grains and Other Products Raised
Total Cooperative Distributions Amount (1099-PATR): Taxable Amount
Agricultural Program Payments:
Taxable Amount
Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported Under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds
Custom Hire (Machine Work) Income
Other Income
Inventory – Livestock at Beginning of Year
Cost of Livestock, Produce, etc During Year
Inventory of Livestock, at End of Year

1116 - Foreign Tax Credit

Ownership code
Elect to Use Simplified Foreign Tax Credit
Type of Income
Resident of (Name of Country)

Part I – Taxable Income from Foreign Sources

Name of Foreign Country or US Possession
Gross income from Sources within Country
Gross AMT Income within Country
Expenses Definitely Related to Line 1a Income
Gross Income from All Sources
Other Interest Expense
AMT Other Interest Expense
Losses from Foreign Sources

Part II – Foreign Taxes Paid or Accrued Taxes:

Date Paid or Accrued

Taxes Withheld at Source on:

Other Foreign Taxes Paid

Foreign Taxes Paid in U.S. Dollars:

Other Foreign Taxes Paid

2441 – Child Care Credit

Child Care Credit

Part I – Persons or Organizations Who Provided Care

Name
Street address
City State and ZIP Code
SSN
EIN
Amount Paid

2106 Employee Business Expense

Employee Business Expenses

Occupation
Spouse

Step 1 Expenses

Parking Fees, Tolls, etc
Travel Expense Away From Home:
Lodging
Car Rental
(Not Meals and Entertainment)
Business Expenses Not Included Above
Meals & Entertainment Expenses

8379 – Form 8379

Injured Spouse Claim and Allocation

Two-letter State Code if Community Property State
Injured Spouse is Taxpayer or Spouse
Divorced or Separated from Spouse on Joint Return and Want Refund Issued in This Name Only
Current Street Address
Current ZIP Code
Current City
Current State
Part II – Items Allocated to Injured Spouse
Wages
Other Income Amount
Adjustments to Income

Standard or Itemized Deductions

Number of Exemptions
Credits
Other Taxes
Federal Income Tax Withheld
Payments

8615 – Form 8615

Tax for Certain Children

Parent's Name
Parent's Last Name
Parent's Social Security Number

8814 – Form 8814

Parents Election to Report Child's Interest and Dividends

Child's First Name
Child's Last Name
Child's Social Security Number
Child's Taxable Interest Income
Child's Ordinary Dividends
Child's Qualified Dividends
Child's Capital Gain Distributions

8829 – Form 8829

8829 Business Use of Home

Part I – Part of Your Home Used for Business

Area Used Exclusively for Business
Total Area of Home
Total Hours Facility Used (Day Care)
Total Hours Available (if Started or Stopped Day Care in 2009)

Part II – Allowable Deductions

Direct Expenses

Casualty losses
Deductible Mortgage Interest
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses

Indirect Expenses

Casualty losses
Deductible Mortgage Interest
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses
Carryover of Operating Expenses from 2008
Excess Casualty Losses
Carryover of Excess Casualty Losses from 2008
Casualty Losses Included on Lines 14 and 32

Part III – Depreciation of Home

Smaller of Home's Adjusted Basis or Its Fair Market Value
Value of Land
Depreciation Percentage
Depreciation Allowable

8839 – Form 8839

Qualified Adoption Expenses

Child's Name – First and Last
Year of Birth
Born Before 1992 and Disabled
Special Needs Child
Foreign Child
Social Security Number
Qualifying Expenses

Part II – Adoption Credit

Child #1
Amounts from Line 3 And 6
Child #2
Amount from Line 3 And 6
2004 Credit Carryforward from 2008
2005 Credit Carryforward from 2008
2006 Credit Carryforward from 2008
2007 Credit Carryforward from 2008
2008 Credit Carryforward from 2008

Part III – Employer-Provided Adoption Benefits

Child #1
Prior Year Employer-provided Adoption Benefits
Total Employer-provided Adoption Benefits Received
Child #2
Prior Year Employer-provided Adoption Benefits
Total Employer-provided Adoption Benefits Received

8853 – Form 8853

Archer MSAs and LTC Insurance Contracts

Section A- Archer MSA

Total Employer Contributions for 2009
Archer MSA Contributions Made for 2009
Compensation from Employer Maintaining HDHP
Total Archer MSA Distr Rcvd During 2009
Distributions Rolled Over To Another MSA
Unreimbursed Qualified Medical Expenses

Section B – Medicare Advantage Distributions

Total Unreimbursed Qualified Medical Expenses

Section C- Long-term Care (LTC) Insurance

Name of Insured:
First Name
Last Name
Social Security Number of Insured
In 2009, Anyone Other Than TP Receive Pymts
Was Insured a Terminally Ill Individual
Gross LTC Payments Received
Part from Qualified LTC Insurance Contracts
Accelerated Death Benefits Received
Number of Days in the LTC Period
Costs Incurred For Qual LTC Services Provided
Total Reimbursements

2555 – Foreign Earned Income

Foreign Earned Income

Spouse's Form 2555
Foreign Address
Foreign City
Foreign State or Province
Foreign Postal Code
Foreign Country Code
Name of Employer
Employer Address – U S Address
Employer Address – ZIP, City, State
Employer Address – Foreign Address
Employer Address – Foreign City
Employer Address – City
Employer Address – State or Province
Employer Address – Postal Code
Employer Address – Country
Employer Is:
A Foreign Entity
A U S Company
Self
A Foreign Affiliate of U S Company
Other
Other – Specify
Last year (after 1981) Form 2555 Was Filed
Type of Exclusion and Tax Year for Which It Was Effective
Citizen of Which Country
Maintained a Separate Home for Family Because of Adverse Conditions - City and Country
Number of Days Home was Maintained
Tax Home Location during the Year
Date Home Was Established

Part II – Taxpayers Bona Fide Residence Test

Date Bona Fide Residence Began
Date Bona Fide Residence Ended
Kind of Living Quarters
Relationship of Family Member Living Abroad With Taxpayer
Period of Time Family Member Lived Abroad With Taxpayer
Statement Submitted to Foreign Country That Taxpayer is Not a Resident of That Country
Taxpayer Required to Pay Income Tax to Foreign country
List Any Contractual Terms
Type of Visa
Did Visa Limit Stay in Foreign Country
Address of US Home Maintained
Was US Home Rented
Name of Occupants
Relationship

Part III – Taxpayers Physical Presence Test

Enter Information Concerning Travel Abroad

Part IV - All Taxpayers

Total Wages, Salaries, Bonuses, Commissions
Allowable Share of Income for Srvc Performed –
In a Business
In a Partnership
Partnership Name, Address, Nature of Income
Noncash Income
Home
Meals
Car
Other Properties or Facilities
Allowances / Reimbursements:
Cost of Living and Overseas Differential
Family
Education
Home Leave
Quarters
Any Other Purpose
Other Foreign Earned Income Amount
Total Excludable Meals and Lodging

Part VI – Claiming Housing Exclusion and/or Deduction

Qualified Housing Expenses for the Tax Year
Number of Days in Qualifying Period
Employer Provided Amounts

Part VIII – Claiming Housing Exclusion

Deductions Allowed That Are Allocable to Excluded Income

Part IX – Claiming Housing Deduction

Housing Deduction Carryover from 2008

Assets – Asset Manager

General Tab

Asset ID
Description
Type
Date
Cost
Current Sec 179

Prior Sec 179
Land
Basis
Method
Period
Convention
Current Deprec
Business use Percent

Section 179 Property
Amortization Code Section
Amortization Period

Disposition Tab

Type of Disposition
Date of Disposition