



Kratzner's Payroll and Tax Service

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Tax Year 2009 Important Tax Documents

- W-2's, 1099's and K-1's
- Mortgage interest statements (1098)
- Real estate taxes paid
- Alimony paid/received
- Medical/Dental expenses
- Proof of charitable donations
- Documents for sale/purchase of home
- Child care expenses and provider info
- Retirement fund contributions/distributions
- Un-reimbursed job expenses
- MSA/HSA transactions
- Stock sale info (purchase date/cost)
- Tax notices regarding prior year return
- Higher education expenses
- Account info for direct deposit of refund
- Major purchase documents (auto/boat/camper/other)
- Other tax documents