

# AMR Tax Services, Inc.

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December 31, 2009

Dear Friends,

Thank you all so much for a successful tax season last year. Each year brings new growth and possibilities. This is another exciting year and we look forward to seeing you.

This past year has brought many changes to personal income taxes. We have different deductions that are available, new and extended credits, along with adjusted income levels for Earned Income Credit and Child Tax Credits. Please take the time to fill out a worksheet even if you have not in the past.

We have online booking available through our website. For those we served last year, you are already registered. You can log in using your last name as the user name and your house number as the password. When you book online you will receive a confirmation e-mail and a reminder the day before your appointment. AMR Tax Services, Inc. now offers online tax filing for those who do their own. Please refer your friends to our web site.

Before coming in for your appointment, please take the time to review your last years return to verify the social security numbers of all persons listed. The IRS checks all the numbers and if one is wrong it will cause a delay in the processing of your return. For electronic filers this is detected immediately, but for paper filers wrong social security numbers can extend the processing time by several weeks.

AMR Tax Services, Inc. is an Authorized E File Provider. We offer the full range of E-File options. Please be sure to verify the names and social security numbers on your return. The IRS verifies all these on electronically filed returns. If these items are wrong, there could be a delay in the amount of time it takes you to receive your refund. **EARNED INCOME CREDIT RECIPIENTS SHOULD BE AWARE THE IRS IS EXPANDING THE EIC VERIFICATION CHECKS. THIS COULD RESULT IN A DELAY IN THE REFUND FOR EARNED INCOME CREDIT.** Keep in mind you may file electronically even if you owe money. This way you have verification the IRS and Oklahoma Tax Commission have received your return, and you still have until April 15 to pay the tax.

We look forward to seeing you during this filing season. Please book your appointments in advance whenever possible. Use our online scheduling [www.amrtax.com](http://www.amrtax.com)

Respectfully,



Adam Roberts  
President

**DEPENDENTS**

Name	SS#	Relationship	Birth-date	College Tuition

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**DON'T FORGET AMR'S REFERRAL PROGRAM. CASH BACK TO YOU FOR YOUR REFERRALS  
NO COUPON REQUIRED.**

List **INTEREST** and/or **DIVIDEND** income by source and amount (Please Bring The Statements):

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

List **Other Income:** \_\_\_\_\_ \$ \_\_\_\_\_

List **UNEMPLOYMENT COMPENSATION RECEIVED**.....Husband or Single \$ \_\_\_\_\_ Wife.....\$ \_\_\_\_\_

List **SOCIAL SECURITY BENEFITS RECEIVED**..... Husband or Single \$ \_\_\_\_\_ Wife..... \$ \_\_\_\_\_

List amounts **contributed** to **IRA ACCOUNTS**..... Husband or Single \$ \_\_\_\_\_ Wife.....\$ \_\_\_\_\_

**Check Box** if you **Itemized Your Deductions** last year.....

**Student Loan Interest Paid** ..... \$ \_\_\_\_\_

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**MEDICAL EXPENSES:** Please **DO NOT** include amounts paid by **PRE-TAX PAYROLL DEDUCTION**. (Cafeteria Plan)

PRESCRIPTION DRUGS \$ \_\_\_\_\_ HOSPITALIZATION INS. \$ \_\_\_\_\_ DENTAL ..... \$ \_\_\_\_\_  
EYE GLASSES..... \$ \_\_\_\_\_ HOSPITALS ..... \$ \_\_\_\_\_ DR. \_\_\_\_\_ \$ \_\_\_\_\_  
MISCELLANEOUS..... \$ \_\_\_\_\_ DR. \_\_\_\_\_ \$ \_\_\_\_\_ MEDICAL EQUIPMENT \$ \_\_\_\_\_

**TAXES PAID**

REAL ESTATE TAX..... \$ \_\_\_\_\_ EXCISE TAX \$ \_\_\_\_\_ \$ \_\_\_\_\_  
ADDITIONAL STATE TAX PAID WITH LAST YEARS RETURN \$ \_\_\_\_\_ **ELECTRIC VEHICLE COST** \$ \_\_\_\_\_

**HOME MORTGAGE INTEREST** (List Mortgage Company or individual and amount)

\_\_\_\_\_ \$ \_\_\_\_\_ \_\_\_\_\_ \$ \_\_\_\_\_ \_\_\_\_\_ \$ \_\_\_\_\_

**CHARITABLE DONATIONS** (List Non-Profit Organization and amount)

CHURCH..... \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
UNITED WAY/CFC.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**MISCELLANEOUS EXPENSES**

UNION DUES..... \$ \_\_\_\_\_ PROF. BOOKS..... \$ \_\_\_\_\_ TOOLS FOR JOB.....\$ \_\_\_\_\_  
SAFETY SHOES ..... \$ \_\_\_\_\_ GLOVES..... \$ \_\_\_\_\_ UNIFORM EXPENSES... \$ \_\_\_\_\_  
PROF. EDUCATION.... \$ \_\_\_\_\_ SAFE DEPOSIT BOX..... \$ \_\_\_\_\_ TAX SERVICE FEE.....\$ \_\_\_\_\_

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**TRAVEL OR AUTO EXPENSES INCURRED ON YOUR JOB**

MOTELS & AIRFARE.....\$ \_\_\_\_\_ CAR RENTAL.....\$ \_\_\_\_\_ TOTAL MILEAGE..... \_\_\_\_\_  
MEALS (ACTUAL AMOUNT OR NUMBER OF DAYS AWAY)..... \$ \_\_\_\_\_ BUSINESS MILEAGE.... \_\_\_\_\_  
LONG DIST/CELLULAR...\$ \_\_\_\_\_ INSURANCE, REPAIRS, GAS, OIL, ETC..... \_\_\_\_\_  
PARKING & TOLLS \$ \_\_\_\_\_ LOCAL TRANSPORTATION (Taxi, Bus, Train, etc).....\$ \_\_\_\_\_

**ENERGY EFFICIENT HOME IMPROVEMENTS:**

WINDOWS.....\$ \_\_\_\_\_ STORM DOORS.....\$ \_\_\_\_\_ HIGH EFFICIENCY HVAC SYSTEM (14 SEER OR BETTER).....\$ \_\_\_\_\_  
INSULATION.\$ \_\_\_\_\_ OTHER.....\$ \_\_\_\_\_ HIGH EFFICIENCY WATER HEATER (14 SEER OR BETTER)..\$ \_\_\_\_\_

**CHILD CARE EXPENSES** LIST NAME, ADDRESS, SOCIAL SECURITY NO. OR FEDERAL ID NO. OF PROVIDER AND AMOUNT PAID

LIST AMOUNTS PAID THROUGH **PRE-TAX PAYROLL DEDUCTION**...(CAFETERIA PLAN) .....\$ \_\_\_\_\_

NAME	ADDRESS	ID NUMBER	AMOUNT PAID

**RENTAL INCOME AND EXPENSES** (Worksheet available if more than one property)

INCOME COLLECTED...\$ \_\_\_\_\_ LEGAL EXPENSE\$ \_\_\_\_\_ REAL ESTATE TAXES.... \$ \_\_\_\_\_  
ADVERTISING..... \$ \_\_\_\_\_ UTILITIES..... \$ \_\_\_\_\_ MORTGAGE INTEREST \$ \_\_\_\_\_  
TRAVEL EXPENSES..... \$ \_\_\_\_\_ REPAIRS..... \$ \_\_\_\_\_ CLEANING & MAINT.... \$ \_\_\_\_\_  
INSURANCE..... \$ \_\_\_\_\_ SUPPLIES..... \$ \_\_\_\_\_ \_\_\_\_\_ \$ \_\_\_\_\_