

MULTI-STATE OR PART-YEAR RETURN FILERS

If you did not move in 2009 – go to section 2

Section 1

If you moved during 2009, you will either need to file returns in multiple states or a part-year return in one state. In order for us to process your return(s), we need the following information:

Move Info:

From: _____
City, State County

Date you left: _____

To: _____
City, State County

Date you arrived: _____

Brief reason for move: _____

If you drove from your **prior** home to your **new** workplace, how many miles would that be (approx)? _____

How many miles from your **prior** home to your **old** workplace? _____

Section 2

Please make the following notes on your 1099s and other documents:

For each income and expense, we need to know which state it applies to. For example, on the Form 1099's you've received for 2009 income sources (such as dividends, interest and stock/mutual fund accounts) please note on each statement the dates that the account was active:

- *If the account had activity all year (i.e. while you resided in more than 1 state), note "ALL YEAR."*
- *If the account was closed upon your move (or shortly thereafter), note "ACCT CLOSED MM/DD/YY."*
- *If the account was opened in conjunction with your move, note "ACCT OPENED MM/DD/YY."*

Do you know of any codes or other information that you have provided in the past on your state returns? (Some states require school district codes, county codes, etc.) If so, please list that information here along with other notes of importance or questions regarding your multi-state returns (If not, I will get back to you with any additional information needed):
