



# TAXPAYER INFORMATION

The information on this page is required for every taxpayer. Please review each section on this page and report items that are applicable to you, your spouse or dependents.

## A1 - TAXPAYER INFORMATION

Returning clients can skip this section except for changes.



<b>Filer Name</b> (Must Match SS Admin)		Birth Date / /	
Social Security No.	<input type="radio"/> If Legally Blind		
Occupation	<input type="radio"/> Day <input type="radio"/> Evening		
Contact Phone	E-Mail Address		
<b>Spouse Name</b> (Must Match SS Admin)			
Social Security No.	Birth Date / /		
Occupation	<input type="radio"/> If Legally Blind		
Contact Phone	<input type="radio"/> Day <input type="radio"/> Evening		
E-Mail Address			

## A2 - ADDRESS

Returning clients can skip this section except for changes.



Street	Apt/Unit No		
City	State	Zip	
Home Phone Number			

## A3 - STATUS CHANGES FOR 2013

Check any that apply and enter the effective date.

<input type="radio"/> Married /	<input type="radio"/> Moved /
<input type="radio"/> Separated /	<input type="radio"/> Home Sold /
<input type="radio"/> Divorced /	<input type="radio"/> Spouse Deceased /
<input type="radio"/> Retired /	<input type="radio"/> Dependent Deceased /

## A4 - ESTIMATED TAXES PAID

This office cannot assume that all estimated taxes were paid as originally scheduled or on time. Therefore, please enter the amounts and dates of payment or provide proof of payments. Incorrect amounts will result in IRS correspondence after the return is filed.



Payment & Due Date	Date Paid	Federal	State
Applied from Last Year's Refund			
First Quarter April 15, 2013			
Second Quarter June 17, 2013			
Third Quarter Sept. 16, 2013			
Fourth Quarter Jan. 15, 2014			

## A5 - REFUND DIRECT DEPOSIT

Complete this section to have your refund automatically deposited into your bank account. Doing so will speed up the refund and eliminate the danger of a check being lost or stolen. Direct deposit can be allocated to up to 3 separate accounts. Entries for only one account are provided below. If you wish to make multiple deposits, please provide the additional account information and how you wish to allocate the refund.

Bank Routing Number (Exactly 9 Digits)	<input type="text"/>
Account Number (include hyphens - omit spaces & special characters - 17 digits max)	<input type="text"/>
<input checked="" type="checkbox"/> Account Type: <input type="radio"/> Checking <input type="radio"/> Savings	Allocation: <input type="text"/>

## A6 - INCOME & ADJUSTMENTS



	You	Spouse
<b>W-2 Wages - Please provide W-2 forms</b> (retain copy "C" for your records)		
<b>Partnership, Trust or S-Corporation K-1s</b> (provide complete K-1 copies)		
Were you the beneficiary of an inheritance? <i>If so, please verify with executor or trustee if you will be receiving a K-1.</i>	<input type="radio"/> Yes	<input type="radio"/> Yes
State Tax Refund (provide 1099-G)		
Social Security or RR (provide SSA-1099 or RRB-1099)		
Pension Income (provide all 1099-Rs)		
Alimony Received (IRS matches with alimony paid)		
Alimony Paid (provide name and SSN below) Paid to: _____ SS#: _____		
Tips (not included in W-2)		
Unemployment Compensation (provide 1099-G)		
Gambling Winnings (provide W-2Gs)		

## A7 - IRA & SE PLANS



	You	Spouse
Retirement Plan with your Employer?	<input type="radio"/> Yes	<input type="radio"/> Yes
Did you or your spouse convert a traditional IRA into a Roth IRA during 2013?	<input type="radio"/> Yes	<input type="radio"/> Yes
<b>Traditional IRA, Keogh &amp; SEP Plans</b>		
Contributions		
Withdrawals (1099-R) <sup>(1)</sup>		
Rollovers <sup>(2) (3)</sup>		
Basis (Total of prior year non-deductible contributions)		
<b>Roth IRA</b>		
Contributions		
Withdrawals (1099-R) <sup>(1)</sup>		
Rollovers <sup>(2) (3)</sup>		
<small>(1) Show reason if under age 59 1/2 (2) Must be reported even if not taxable unless directly "transferred" (3) Rollovers from Traditional to a Roth IRA may be taxable.</small>		

## A8 - SPECIAL QUESTIONS & INFORMATION

Coverdell Education Account <b>Contribution</b>	
Coverdell Education Account <b>Distribution</b> (provide 1099-Q)	
Qualified Tuition Plan (Sec. 529) <b>Distribution</b> (provide 1099-Q)	
Student Loan Interest paid (provide 1098-E)	
HSA Distributions (provide 1099-SA)	
Adoption Expenses <input type="radio"/> <input checked="" type="radio"/> If "special needs child"	
<b>CAUTION</b> - Review the following questions carefully. There are severe penalties associated with failing to report an interest or signature authority over a foreign bank account. Please call our attention to any dealings related to foreign accounts and inheritances.	
<input checked="" type="checkbox"/> If you or your spouse have signature authority or are named as a co-owner on a bank account in a foreign country even if the funds are not yours.	<input type="radio"/>
<input checked="" type="checkbox"/> If you received an inheritance from someone in a foreign country.	<input type="radio"/>
<input checked="" type="checkbox"/> If you or spouse have a foreign bank account (over \$10,000)	<input type="radio"/>
<input checked="" type="checkbox"/> If you or your spouse received a distribution from, or were the grantor, or transferor to, a foreign trust	<input type="radio"/>
<input checked="" type="checkbox"/> If at any time during the year you or your spouse held an interest in a foreign financial asset	<input type="radio"/>
<input checked="" type="checkbox"/> If you have been denied Earned Income Credit by the IRS	<input type="radio"/>
<input checked="" type="checkbox"/> If you have been re-certified for the Earned Income Credit	<input type="radio"/>
<input checked="" type="checkbox"/> If you bought, sold, or gifted real estate in 2013. <i>If you have, please call in advance to discuss what documents are needed.</i>	<input type="radio"/>
<input checked="" type="checkbox"/> If you made a gift of money or property to any individual in excess of \$14,000 (\$28,000 for joint gifts by a married couple)	<input type="radio"/>
<input checked="" type="checkbox"/> If you employ household workers	<input type="radio"/>
<input checked="" type="checkbox"/> If you sold jewelry, gold, coins, or other precious metals during the year	<input type="radio"/>
<input checked="" type="checkbox"/> If you wish to contribute to the Presidential campaign fund: <input type="radio"/> You <input type="radio"/> Spouse	

# ADDITIONAL INFORMATION

The information on this page is required for every taxpayer. Please review each section on this page and report items that are applicable to you, your spouse or dependents.

## A9 - DEPENDENTS

Returning clients need only enter the first names since the other info is on file. Enter all the information for new dependents.

First Name	Last Name (If Different)	Social Security # (Mandatory)	Enter S for Son, D for Daughter, R for Relative, O for Other if you are NOT the child's custodial parent	Months in Home (Your Home)	Birth Date	If over the age of 18 Income	if Student
			<input type="radio"/>		/ /		<input type="radio"/>
			<input type="radio"/>		/ /		<input type="radio"/>
			<input type="radio"/>		/ /		<input type="radio"/>

## A10 - INTEREST INCOME

IRS matches payer and amount. Always use the payer name listed on 1099 even if not the original source.

**Caution: All interest must be reported even if tax-free!**

Name of Payer <small>Please provide all forms 1099INT and 1099OID (Entries are not needed when 1099s are provided)</small>	Banks, Credit Union, Corp Bonds, etc.	Seller Financed Mortgages	Direct U.S. Obligations <small>Savings Bonds, T-Bills, etc. (State Tax-Free)</small>	Home State Municipal Bonds <small>(Generally Tax-Free)</small>	Other State <small>(Federal Tax-Free)</small>
		Note: Seller financed mortgages require the name, SS# and address of the payer. See the special line below.			
Payer Name:	SS#:		Address:		
Forfeited Interest			Federal Tax Withholding on Interest & Dividends		

## A11 - DIVIDEND INCOME

IRS matches payer and amount. Always use payer name listed on 1099 even if not the original source. Some institutions use substitute 1099s and caution must be used in separating the various types of dividends. Please bring broker statements.

Name of Payer - Please provide all forms 1099DIV <small>(Entries are not needed when 1099s are provided)</small>	Foreign Taxes Paid	Ordinary	Qualified Dividends <sup>(1)</sup>	Capital Gains	Source U.S. Obligations <sup>(2)</sup>	Taxable to State Only	Non-Taxable State & Federal

(1) Qualified dividends receive special tax treatment and are included in the "Ordinary Dividends" total. (2) Includes income from savings bonds, T-Bills, etc., which are state tax-free.

## A12 - INVESTMENT SALES

IRS matches gross proceeds from sales using the 1099-B. All transactions must be reported even if there is no profit. If broker provides a summary of transactions, bring it and skip this section. For home sales, see Section D1.

Description <small>(Please provide all forms 1099B)</small>	✓ If Inherited	Date Acquired	Date Sold	Selling Price	Cost or Other Basis <sup>(1)</sup>	Profit <small>(Memo Only)</small>
	<input type="radio"/>	/ /	/ /			
	<input type="radio"/>	/ /	/ /			
	<input type="radio"/>	/ /	/ /			
	<input type="radio"/>	/ /	/ /			
	<input type="radio"/>	/ /	/ /			

(1) The basis from which gain is determined may not be the original cost and must account for stock splits, reverse splits, mergers, reinvested dividends, wash sales, etc.

## A13 - CHILD OR DEPENDENT CARE EXPENSES

Care must enable you to work (or search for work) or attend school FULL-TIME. Care must be for a child under age 13 or an individual who is physically or mentally incapable of self care. If you are a student, also see section C4. IRS matches employer provided care benefits and income reporting of care provider.

<input type="radio"/> <b>✓ If you have employer provided dependent care benefits</b>	Provider's SSN or Employer ID# <b>MANDATORY</b> unless it is an exempt organization. Check circle if exempt.	<b>Payments MUST Be Allocated By Child/Dependent</b>		
		Child/Depnd.'s Name	Child/Depnd.'s Name	Child/Depnd.'s Name
<input type="radio"/> <b>Paid To</b>	<input type="radio"/> <b>Address &amp; Phone Number</b>			



# RELOCATION, HOME SALE, DEBT RELIEF, ENERGY CREDITS

## D1 – HOME SALE

If you sold your home, abandoned it, or lost it to foreclosure, the disposition may need to be reported. If you received a 1099-S, it is very important that you provide it. If you abandoned the home or lost it to foreclosure, see Section D4.

Address of Home Sold	
Date Purchased	/ /
Purchase Price (including purchase escrow costs)	
Gain Deferred from a Home Sale made prior to 5/7/1997 This generally does not apply to individuals who have previously sold a home after 5/6/1997. If it applies, bring the Form 2119 for the year of the last home sale prior to 5/7/97.	
Improvements to Home Sold (not maintenance)	
Date of Sale	/ /
Sales Price	(Please bring final closing escrow statement. This document will have the information needed for these entries.)
Sales Expenses	
<input checked="" type="checkbox"/> If you owned and used the home as your primary residence for two of the prior five years (counting back from the sale date)	<input type="checkbox"/>
<input checked="" type="checkbox"/> If your spouse (if married) owned and used the home as his/her primary residence for two of the prior five years	<input type="checkbox"/>
If owned and used less than two years, give reason for sale:	
<input checked="" type="checkbox"/> If the home was ever used for business (such as a rental, home office or day care center)	<input type="checkbox"/>
<input checked="" type="checkbox"/> If any of the business use in the prior question was before 5/7/97	<input type="checkbox"/>
<input checked="" type="checkbox"/> If the home was acquired by tax-deferred (Sec 1031) exchange after 10/22/04	<input type="checkbox"/>
<input checked="" type="checkbox"/> If you (and spouse if married) have excluded gain from the sale of a prior residence within two years of the date of sale of this residence	<input type="checkbox"/>
<input checked="" type="checkbox"/> If the home was inherited (including from a deceased spouse)	<input type="checkbox"/>
<input checked="" type="checkbox"/> If the home was not used as your primary residence for any period after 2008	<input type="checkbox"/>
<input checked="" type="checkbox"/> If you previously claimed the new or long time resident homeowner credit	<input type="checkbox"/>

## D2 – HOME ENERGY CREDITS

Enter only items certified by the manufacturer to meet Government energy standards.

**Energy-Efficient Property** – QUALIFIED solar electric generation, solar water heating systems, fuel cell property, wind energy property, and geothermal heat pumps for a RESIDENCE OF THE TAXPAYER LOCATED WITHIN THE U.S.   If primary residence

Description of Property	Cost

## D3 – MOVING DEDUCTIONS

To qualify for a moving expenses deduction, the distance to the new job from the old home must be at least 50 miles farther than to the old job from the old home.

If employer reimbursed any amount of moving expense or home sale assistance and provide the reimbursement statement from the employer (Form 3903 or a substitute statement)

A - Miles from Old Residence to New Job	miles
B - Miles from Old Residence to Old Job	miles
A minus B – if less than 50 miles, stop: no deduction allowed	miles
Commercial Mover	Temporary Storage (up to 30 days)
Truck Rental	Rental Fuel Costs
Trailer Rental	Highway Tolls
Lodging en route (no meals)	Airfare
# of owned vehicles driven to new home	Auto Travel miles
Boxes/Tape/Supplies	Other:
Other:	Other:

## D4 – DEBT RELIEF & FORECLOSURE

If you had debt totally or partially forgiven, you may be required to report debt relief income. This includes real estate mortgages, credit card debt, vehicle loans, etc. Debts discharged in bankruptcy are not included. Please call the office in advance to discuss what additional documentation may be required.

If you had any amount of credit card debt forgiven and provide a copy of the 1099-C you received from the financial institution

If you abandoned your home and provide a copy of the 1099-A and/or the 1099-C you received from the financial institution (also complete Section D1 home sale information)

If your home was foreclosed upon or you sold it under a "short sale" agreement with the lender and provide a copy of the 1099-A and/or the 1099-C you received from the financial institution (also complete Section D1 home sale information)

## D5 – QUESTIONS YOU MAY HAVE

## D6 - SIGNATURE

To the best of my knowledge, all the information contained within this document is true, correct and complete.

_____/_____/_____ Filer's Signature	_____/_____/_____ Date	_____/_____/_____ Spouse's Signature	_____/_____/_____ Date
--	---------------------------	---	---------------------------