GENERAL INFORMATION

2013 (MAIN INFO)

Taxpayer's First Name ______ M.I. ______ Spouse's First Name ______ Spouse's M.I. ______

Taxpayer's Last Name ______ Suffix ______ Spouse's Last Name (if different) ______

Taxpayer's Social Security Number ______ Spouse's Social Security Number ______

Present Home Address ______ City, State, Zip Code ______

E-Mail Address ______

Filing Status: Please Check One

☐ Single ☐ Married Filing Joint ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Widow(er)

If you selected head of household and have no dependents, list the name ______
and Social Security number ______ of your qualified child who lives with you and qualifies you for this status.

Dependents/Nondependents Qualifying for Child Care and/or EIC

Note: If any children listed below are nondependents then mark an `X' in the column listed "Non Dep."

First Name	Last Name	Date of Birth	Social Security Number	Relationship	Months in home	Non Dep.

If you are claiming as a dependent a child who did not live with you, check the documents that substantiate this claim:

☐ Pre-1985 divorce or separation agreement ☐ Signed Form 8332

☐ Post-1984 divorce or separation agreement WITHOUT CONDITIONS

Taxpayer's Birth Date ______ Spouse's Birth Date ______

Taxpayer's Occupation ______ Spouse's Occupation ______

Daytime Phone ______ Daytime Phone ______

Evening Phone ______ Evening Phone ______

Cell Phone ______ Cell Phone ______

State of Residency:(2-Letter Abbreviation) State of Part-year Residency 2nd State of Part-year Residency

Please use the following space for any comments you wish to make to your preparer.

2013 TAX QUESTIONS

AT ANY TIME DURING 2013:

Did you or your spouse receive income from the following sources:

YES	NO	
		Wages?
		Tips?
		Interest or Dividends?
		Social Security or Tier I Railroad Retirement?
		Lump sum from an employer sponsored plan and the recipient and/or employee was born before 1936?
		Retirement or IRA distribution for which the recipient is under age 59 1/2?
		Other pension, annuity, IRA, or retirement income?
		If IRA distribution, were nondeductible contributions ever made?
		If yes, provide the balance of all IRA accounts as of the end of 2013.
		Unemployment compensation?
		Alimony?
		Self-employment and/or operation of a business?
		Operation of a farm?
		Rental of land and property for agricultural purposes?
		Other rental property?
		Gambling winnings?
		Royalties?
		Any miscellaneous income, such as prizes or jury duty pay?

Did you or your spouse receive any of the following forms: (Please provide them to your preparer)

YES	NO	
		W-2
		W-2G
		1099R
		1099INT
		1099DIV
		1099MISC
		1099B
		1099S
		1099G
		Any other 1099
		K-1
		IRS notice of change to prior year's return
		Closing statements from real estate sales, purchases, or refinancing

Did you or your spouse sell or dispose of any of the following property:

YES	NO	
		Stock, mutual fund, or other non-business assets?
		Your personal residence?
		Rental property?
		Property relating to a business or farm?
		Any other business property not listed above? (i.e. equipment, land)
		If you sold any property above, did it involve a bartering agreement?
		If you sold any property above, are you receiving payments in installments?

2013 TAX QUESTIONS

AT ANY TIME DURING 2013:

Did you or your spouse

YES	NO	
		Have a home mortgage?
		Refinance your home mortgage?
		Use a portion of your home exclusively for business?
		Have medical expenses or pay for health insurance?
		Make regular or substantial contributions to charity, church, etc.?
		If yes, did you make over $500.00 in non-cash contributions?
		Suffer a loss as a result of a casualty (fire, theft, natural disaster, etc.)?
		Incur any out-of-pocket expenses or use your personal vehicle in conjunction with your job?
		Move to be closer to a new job?
		Send payments to the IRS/state in order to prepay your current year tax liability (estimated taxes) or apply an overpayment from 2012?
		Have any interest in a partnership or S-corporation, estate or trust for which you expect to receive Form K-1?
		Have any household employees to whom you paid $1000.00 or more?
		Have a qualified fuel tax credit?
		Contribute to an: ☐ IRA? ☐ SEP? ☐ Keogh? ☐ Roth? ☐ or Simple retirement plan?
		Get claimed (or were eligible to be claimed) as a dependent on anyone else's return?

YES	NO	
		Did your children receive more than $950 and less than $9500 from interest and dividends that you wish to claim on your own tax return instead of your child's?
		Did you pay child or dependent care expenses? If so, please bring names, addresses, Social Security/EIN numbers, amount paid to each provider, and amount paid for each dependent.
		Did you pay qualified post-secondary education tuition and related expenses for yourself, your spouse, or your dependents?
		Did you cash any US EE or I bonds to pay for post-secondary education for yourself, your spouse, or your dependents?
		Did you pay interest on higher education loans?
		Were you a pre-college educator who purchased books or classroom supplies?
		Did you purchase a car, boat, aircraft, motor home or home building materials in 2013 or keep receipts on all sales tax items purchased in 2013?
		Were there any births, adoptions, divorces, marriages, or deaths in your household?
		Do you desire direct deposit? If yes, please attach voided check.