FROM

2013 TAX ORGANIZER

TO

This tax organizer has been prepared for your use in gathering the information needed for your 2013 tax return.

To save you time, selected information from your 2012 tax return has been entered in this organizer. Please line through any information that does not apply to your 2013 tax return.

In some cases, 2012 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.

If we may be of further assistance, please contact us at your convenience.

REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER

Topic Index

Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ".
TSJ Codes - Enter "T" for taxpayer, "S" for spouse or "J" for joint.

For any question answered Yes, please attach supporting detail or documents.

	Yes	No
Personal Information:		
Did your marital status change during 2013?		
Are you legally married?		
If Yes, do you and your spouse want to file separate returns?		
If Yes, will you file a joint federal return and be required to file single state returns?		
If No, are you in a domestic partnership, civil union, or other state-defined relationship?		
Did your address change during 2013?		
Can you or your spouse be claimed as a dependent by another taxpayer?		
Dependents:		
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support		
Did you pay for child care while you worked or looked for work?		
Do you have any children under age 18 with unearned income more than $1000?		
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1000?		
Did you adopt a child or begin adoption proceedings during 2013?		
Purchases, Sales and Debt:		
Did you have any debts canceled, forgiven or refinanced during 2013?		
Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2013?		
Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2013?		
Did you sell, exchange or purchase any real estate in 2013? If so, please attach closing statements.		
Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?		
Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan?		
Did you pay any student loan interest in 2013?		
Are your total mortgages on your first and/or second residence greater than $1,000,000? If so, please provide the principal balance and interest rate at the beginning and the end of the year.		
Did you have an outstanding home equity loan at the end of 2013? If so, please provide the principal balance and interest rate at the beginning and end of the year.		
Did you take out a home equity loan in 2013?		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?		
Did you or your mortgagee receive any mortgage assistance payments? If Yes, enclose Forms 1098-MA.		

Purchases, Sales and Debt (continued):

	Yes	No
Did you engage in any put or call transactions? If Yes, please provide details.		
Did you close any open short sales during 2013?		
Did you sell any securities not reported on your Form 1099-B?		

Itemized Deductions:

	Yes	No
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?		
Did you incur any casualty or theft losses during the year?		
Did you make any large purchases, such as motor vehicles and boats?		
Did you incur any casualty or loss attributable to a federally declared disaster?		

Miscellaneous:

	Yes	No
Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2013? If you received a distribution from an MSA, please include Form 1099-SA.		
Did you or your spouse have any transactions pertaining to a health savings account (HSA) during 2013? If you received a distribution from an HSA, please include Form 1099-SA.		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?		
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?		
Did you or your spouse make a qualified charitable distribution from an IRA during January of 2013 that was treated as though it were made in 2012?		
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?		
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If Yes, include Form 1099-Q.		
Did you or your dependents incur any post-secondary education expenses, such as tuition?		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If Yes, how many months were you covered? Months: ____		
Did you move to a different home because of a change in the location of your job?		
Did you pay in excess of $1,000 in any quarter, or $1,800 during the year for domestic services performed in or around your home to individuals who could be considered household employees?		
Did you receive unreported tip income of $20 or more in any month of 2013?		
Did you or your spouse receive distributions from long-term care insurance contracts? If Yes, please include Form 1099-LTC.		
Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country?		
Did you or your spouse own any foreign financial assets?		
Did you create or transfer money or property to a foreign trust?		
Did you purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle in 2013?		

Questions (Page 3 of 4)

Miscellaneous: (continued)

	Yes	No
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?	☐	☐
If Yes, please provide the gallons of gasoline or special fuels used for off-highway business purposes ________ Gallons ________ Type		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?	☐	☐
Were you notified by the IRS or other taxing authority of any changes in prior year returns?	☐	☐
Did you lose your job during 2013 because of foreign competition and pay for your own health insurance?	☐	☐
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?	☐	☐
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?	☐	☐
Have you been an identity theft victim and have you contacted the IRS?	☐	☐
If Yes, please furnish the 6-digit identity protection PIN issued to you by the IRS ________		
Did you engage in any bartering transactions?	☐	☐
Did you have any work outside of the U.S. or pay any foreign taxes?	☐	☐
Did you or your spouse serve in the military or were you or your spouse on active duty?	☐	☐
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	☐	☐
Will you have healthcare coverage (health insurance) for you, your spouse, and any dependents during 2014?	☐	☐

Gifts:

	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $14,000 to any individual during the year?	☐	☐
Did you or your spouse make any gifts to a trust for any amount during the year?	☐	☐
Do you or your spouse have a life insurance trust?	☐	☐
Did you assist in the purchase of any asset (auto, home) for any individual during the year?	☐	☐
Did you forgive any indebtedness to any individual, trust or entity during the year?	☐	☐
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?	☐	☐

If you answered Yes to any of the above gift questions, please complete Form 34 and/or 35 in the back of the Organizer.

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2013?	☐	☐
Did you receive deferred, retirement or severance compensation?	☐	☐
If Yes, enter the date received (Mo/Da/Yr). Date: ________		
Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account while not taking any distribution?	☐	☐

Miscellaneous: (continued)

	Yes	No
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?		
If Yes, please provide the gallons of gasoline or special fuels used for off-highway business purposes ______ Gallons ______ Type		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Did you lose your job during 2013 because of foreign competition and pay for your own health insurance?		
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?		
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?		
Have you been an identity theft victim and have you contacted the IRS?		
If Yes, please furnish the 6-digit identity protection PIN issued to you by the IRS ______		
Did you engage in any bartering transactions?		
Did you make gifts of more than $14,000 to any individual?		
Did you have any foreign income or pay any foreign taxes during 2013?		
Did you or your spouse serve in the military or were you or your spouse on active duty?		
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?		
Will you have healthcare coverage (health insurance) for you, your spouse, and any dependents during 2014?		

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2013?		
Did you receive deferred, retirement or severance compensation?		
If Yes, enter the date received (Mo/Da/Yr). Date: ______		
Did you or your spouse turn 70 1/2 during the year and have money in an IRA or other retirement account while not taking a distribution?		

Questions (Page 4 of 4)

Sale of Your Home:

	Yes	No
Did you sell your home in 2013?		
If Yes, did you receive Form 1099?		
If Yes, did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?		
Did you ever rent out this property?		
Did you ever use any portion of the home for business purposes?		
Have you or your spouse sold a principal residence within the last two years?		

At the time of the sale, the residence was owned by the: ☐ Taxpayer ☐ Spouse ☐ Both

Additional Information:

	Yes	No
For any trust you created or that you are trustee, have any beneficiaries died during 2013?		
Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2013?		

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2013 Amount Contributed

2013

Personal Information

Taxpayer:

First Name and Initial ____ Last Name ____ Social Security Number ____

Occupation ____ Date of Birth (Mo/Da/Yr) ____ Date of Death (Mo/Da/Yr) ____

Spouse:

First Name and Initial ____ Last Name ____ Social Security Number ____

Occupation ____ Date of Birth (Mo/Da/Yr) ____ Date of Death (Mo/Da/Yr) ____

Contact Information:

Street Address ____ Apartment Number ____

City ____ State ____ ZIP or Postal Code ____

Province or County ____

Foreign Country ____

Taxpayer Daytime/Work Phone ____ Spouse Daytime/Work Phone ____

Taxpayer Evening/Home Phone ____ Spouse Evening/Home Phone ____

Taxpayer Foreign Phone ____ Spouse Foreign Phone ____

Taxpayer Cell Phone ____ **Spouse Cell Phone** ____

Taxpayer Fax Number ____ Spouse Fax Number ____

Taxpayer Email Address ____

Spouse Email Address ____

Preferred Method of Contact ____

	Yes	No
May the IRS or other taxing authority discuss the return with the preparer?		
Is the taxpayer claimed as a dependent on someone else's tax return?		

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you considered legally blind per IRS regulations?				
Do you want to contribute to the Presidential Election Campaign Fund?				

Dependents and Wages

Dependent Information:

Did dependent have income over $3,900?

First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Relationship to Taxpayer	Months Lived in Your Home	X if Disabled	Yes or No

Please provide the name of any person living with you who is claimed as a dependent on someone else's tax return ______

Please list the years that a release of claim to exemption is given for a dependent child not living with you . . ______

Wages and Salaries:

Please enclose all copies of your current year Forms W-2

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER1	Medicare	State	Local

Electronic Filing

Electronic Filing: Please enclose all copies of your current year Forms W-2

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. The IRS has implemented an electronic filing mandate requiring certain preparers, including this firm, to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

Do not electronically file the federal return . . . . ☐

Do not electronically file the state return(s) . . . . ☐

Note: The IRS and some states that require returns to be electronically filed also impose fees and/or penalties for failure to do so. If you checked either of the boxes above, you may be required to sign an "opt-out" form before we can release your returns. As a follow-up we will contact you to discuss these requirements and your ability to "opt-out" of electronic filing.

The IRS requires, and many states allow, the use of a Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?	Yes	No
Taxpayer	☐	☐
Spouse	☐	☐

If No, please enter a 5-digit self-selected PIN:

Taxpayer PIN . . . . ______________

Spouse PIN . . . . ______________

Direct Deposit and Withdrawal

Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information. If you selected either direct deposit or electronic withdrawal in 2012, your account information has already been included below.

Account Information:

Account owner . . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Type of account . . . . . ☐ Checking ☐ Trad. Savings ☐ IRA Savings
☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Account use (check all that apply) . . . . . ☐ Business
☐ Federal return ☐ Federal estimate ☐ State(s)
☐ Direct deposit ☐ Electronic withdrawal

Name of financial institution . . . . . ______
Routing Transit Number . . . . . ______
Account number . . . . . ______

If requesting electronic withdrawal:
What amount do you want withdrawn, if not the entire balance due? . . . . . ______
When should the withdrawal occur, if not the due date of the return? . . . . . ______

Account Information:

Account owner . . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Type of account . . . . . ☐ Checking ☐ Trad. Savings ☐ IRA Savings
☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Account use (check all that apply) . . . . . ☐ Business
☐ Federal return ☐ Federal estimate ☐ State(s)
☐ Direct deposit ☐ Electronic withdrawal

Name of financial institution . . . . . ______
Routing Transit Number . . . . . ______
Account number . . . . . ______

If requesting electronic withdrawal:
What amount do you want withdrawn, if not the entire balance due? . . . . . ______
When should the withdrawal occur, if not the due date of the return? . . . . . ______

Interest Income

Interest Information:

Please enclose copies of all Forms 1099-INT or other documents for interest received

Tax-Exempt Interest Code: 1 - 1099-INT 2 - Private Activity Bond 3 - Both

TSJ	Name of Payer	Savings & Loans, Bank and Other	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	2012 Interest Amount
	Total					

Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	2013 Interest Amount	2012 Interest Amount

Address of Individual to Whom Mortgage Interest Was Paid

Enter Any Additional Information:

Note: Please list all items sold during the year on Form 7.

Dividend Income

Dividend Information:

Please enclose copies of all Forms 1099-DIV or other documents for dividends received

	TSJ	Name of Payer	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Total Capital Gain Distribution	U.S. Bond Interest Amount or Percent in Box 1a
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
		Total				

Tax-Exempt Interest Code: 1 - 1099-DIV 2 - Private Activity Bonds 3 - Both

	Code	Tax-Exempt Interest	2012 Gross Dividends Amount
A			
B			
C			
D			
E			
F			
G			
H			
I			
J			
K			
L			
M			
N			
Total			

Enter Any Additional Information:

Note: Please list all items sold during the year on Form 7.

Business Income and Cost of Goods Sold

Name of Business:

Principal Business or Profession:

TSJ

Employer ID number

Street address

City, state and ZIP code

Method of inventory

Method of accounting

Business Questions for 2013:

	Yes	No
Did you dispose of this business?		
If Yes, what was the disposition date? (Mo/Da/Yr)		
Was there a change in determining quantities, costs or valuations between opening and closing inventory?		
Were you involved in the operations of this business on a regular, continuous and substantial basis?		
Have you prepared or will you prepare all required Forms 1099?		

	2013 Amount	2012 Amount
Health insurance premiums paid for yourself and your dependents		

Income:

Please enclose copies of all Forms 1099-K

	2013 Amount	2012 Amount
Other gross receipts or sales		
Less returns and allowances		

Cost of Goods Sold:

	2013 Amount	2012 Amount
Beginning inventory		
Purchases less cost of items withdrawn for personal use		
Cost of labor (do not include amounts paid to yourself)		
Materials and supplies		

Other Costs of Cost of Goods Sold:

Description	2013 Amount	2012 Amount
Ending inventory		

Other Income:

Description	2013 Amount	2012 Amount

2013

Business Expenses and Property & Equipment

Name of Business: ______________________

Principal Business or Profession: ______________________

Expenses:	2013 Amount	2012 Amount
Advertising		
Car and truck expenses		
Parking fees and tolls		
Commissions and fees		
Contract labor		
Employee benefit programs and health insurance (other than pension and profit-sharing plans)		
Insurance (other than health)		
Interest - mortgage (paid to banks, etc.)		
Interest - other		
Legal and professional fees		
Office expense		
Pension and profit-sharing plans		
Rent or lease - vehicles, machinery and equipment		
Rent or lease - other business property		
Repairs and maintenance		
Supplies (not included in Cost of Goods Sold)		
Taxes and licenses		
Travel		
Meals and entertainment		
Utilities		
Wages		
Dependent care benefits		

Other Expenses:

Description	2013 Amount	2012 Amount

Property and Equipment: Please attach a list if more space is needed

X if not new	Acquisitions - Description	Date Acquired (Mo/Da/Yr)	Cost

Dispositions - Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

Business Expenses - Vehicle and Other Listed Property

Name of Business: ______________________

Principal Business or Profession: ______________________

Listed Property Questions for 2013:

	Yes	No
Do you have evidence to support your deduction?		
If Yes, is the evidence written?		
Do you have evidence to support the business use percentage claimed on listed property?		
If Yes, is the evidence written?		

If you are an employer who provides vehicles for use by employees:

	Yes	No
Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees?		
Do you treat all use of vehicles by employees as personal use?		
Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received?		
Do you meet the requirements for qualified demonstration use by maintaining a written policy statement that prohibits vehicle use by individuals other than full-time vehicle salespersons, use for personal vacation trips, storage of personal possessions in the vehicle and limits the total mileage outside the salesperson's normal working hours?		

Vehicle:

	Vehicle 1	Vehicle 2
Description of vehicle		
Date placed in service (Mo/Da/Yr)		
Do you (or your spouse) have another vehicle available for your personal use?	Yes No	Yes No
Was your vehicle available for use during off-duty hours?	Yes No	Yes No

Mileage:	Vehicle 1 2013 Miles	Vehicle 1 2012 Miles	Vehicle 2 2013 Miles	Vehicle 2 2012 Miles
Total miles				
Total business miles				
Total commuting miles for the year				

Actual Expenses:	Vehicle 1 2013 Amount	Vehicle 1 2012 Amount	Vehicle 2 2013 Amount	Vehicle 2 2012 Amount
Gasoline, oil, repairs, insurance, etc				
Interest				
Taxes				
Fair market value of leased vehicle				
Vehicle rentals/leases				

Business Use of Home

Name of Business: ______________________

Principal Business or Profession: ______________________

Partial Use of Your Home for Business:

	2013	2012
Square footage of home used exclusively for business		
Total square footage of home		
Total hours home was used for day care during the year		

	Yes	No
Was your home used for day care purposes for the entire year?		
Were improvements made to the home and/or home office since the time you began using the home for business?		

Expenses: **Enter all expenses at 100 percent**

Direct expenses benefit the business part of your home.
Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.
Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount
Casualty losses				
Deductible mortgage interest paid to:				
Financial institutions				
Individuals				
Real estate taxes				
Insurance				
Qualified mortgage insurance premiums				
Repairs and maintenance				
Utilities				
Rent				

Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount

Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid

Sales of Stocks, Securities, Capital Assets & Installment Sales

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Please enclose all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?

	Yes	No
Mutual fund transactions		
Exchange of any securities or investments for something other than cash		
Sales of inherited property		
Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale		
Commodity sales, short sales or straddles		
Reinvestment of the proceeds of the sale of a publicly traded security into an SSBIC interest		
Reinvestment of the proceeds of the sale of qualified small business stock in other qualified small business stock		
Debts that became uncollectible		
Securities that became worthless		
Sale of any property where you will receive payments in future years		

	TSJ	Kind of Property and Description	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Gross Sales Price (Less Commissions)
A					
B					
C					
D					
E					
F					
G					
H					

	Cost or Other Basis	Federal Tax Withheld	State Tax Withheld
A			
B			
C			
D			
E			
F			
G			
H			

Installment Sales:

Do not include interest received in principal amount

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2013 Principal Received	2012 Principal Received

Sale of Your Home and Moving Expenses

Sale or Exchange of Your Home:

Please attach the closing statements from the purchase and sale of your former and new homes

Former Home Information:

TSJ . . . .

Date acquired . . . . (Mo/Da/Yr)

Date sold . . . . (Mo/Da/Yr)

Selling price . . . .

Original Cost and Cost of Improvements:

Description	Amount

Sale Expenses:

Commissions, legal fees, advertising and other expenses.

Description	Amount

Did you personally own and occupy the home for at least 2 of the 5 years preceding the sale? . . . . Yes No

If your spouse is deceased, did the sale occur within two years of the date of death and did your spouse live in the home for at least 2 of the 5 years preceding the sale? . . . . Yes No

If you had a foreign mortgage on the above property, please provide the amount of the mortgage retired on the sale and the date the mortgage was acquired or the date the mortgage was most recently renegotiated

Moving Expenses:

TSJ . . . .

Were the moving expenses reimbursed by your employer? . . . . Yes No

Enter reimbursements not included in wages on your Form W-2 . . . .

Mileage:

	Miles
Number of miles from old home to new workplace	
Number of miles from old home to old workplace	
Number of automobile miles in move	

Transportation Expenses:

	Amount
Costs of transportation of household goods and personal effects	
Costs of travel and lodging (do not include meals or automobile expenses)	
Automobile expenses (gasoline, oil, etc.)	
Meals (Pennsylvania only)	

Individual Retirement Account (IRA) Information

Individual Retirement Account (IRA):

TS . . . . ____

IRA Questions for 2013:

	Yes	No
Are you covered by an employer's retirement plan?		
If no, is your spouse covered by an employer's retirement plan?		
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?		
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?		
Did you use any IRA as security for a loan this year?		
Did you have any transactions with any IRA during the year?		

If Yes, please explain. ______________________________

IRA Values, Rollovers, and Distributions: **Please enclose copies of all Forms 1099-R**

Total value of all traditional IRAs on December 31, 2013	
Outstanding rollovers on December 31, 2013	
Total distributions converted to Roth IRAs	
Total retirement plans converted to Roth IRAs	

Contributions: **Please enclose copies of all Forms 5498**

IRA:

Contributions in 2013 for the 2013 tax return	
Contributions in 2014 for the 2013 tax return	
Amount for 2013 you choose to be treated as nondeductible	

Roth IRA:

Contributions made for the 2013 tax year	

Distributions:

Please enclose all Forms 1099-R and any nontaxable distribution details

Name of Payer	2013 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	2012 Gross Distributions

Rental and Royalty Income and Expenses

Location of Property: ____

TSJ ____

Type of property ____

	Yes	No
Have you prepared or will you prepare all required Forms 1099?		

	2013	2012
Ownership percentage if not 100%	%	
How many days was this property rented at fair market value?		
How many days was this property used personally (including use by family members)?		

Income:

Please enclose copies of all Forms 1099-K

	2013 Amount	2012 Amount
Rents received		
Royalties received		

Other Income:

Description	2013 Amount	2012 Amount

Expenses:

	2013 Amount	2012 Amount
Advertising		
Auto and travel		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and other professional fees		
Management fees		
Mortgage interest paid to banks, etc.		
Mortgage interest paid to individuals		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Dependent care benefits		
Employee benefits		

Other Expenses:

Description	2013 Amount	2012 Amount

Partnership, S Corporation, Estate, Trust and REMIC Income

Partnership Income: Please enclose all Schedules K-1

TSJ	Entity Name	Employer ID Number	Health Insurance Paid by Entity

S Corporation Income: Please enclose all Schedules K-1

TSJ	Entity Name	Employer ID Number	Health Insurance Paid by Entity

Estate and Trust Income: Please enclose all Schedules K-1

TSJ	Entity Name	Employer ID Number

Real Estate Mortgage Investment Conduit (REMIC) Income: Please enclose all Schedules Q

TSJ	Entity Name	Employer ID Number

Miscellaneous Income, Adjustments and Alimony

Please enclose Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-G and 1098-E

Miscellaneous Income and Adjustments:

	TSJ ____		TSJ ____	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount
Taxable pensions and annuities received				
Nontaxable pensions and annuities received				
Federal withholding on pensions and annuities				
State withholding on pensions and annuities				
Unemployment compensation received				
Unemployment compensation repaid in 2013				
Social security benefits received				
Social security benefits repaid in 2013				
Medicare premiums withheld				
Tier 1 railroad retirement benefits received				
Tier 1 railroad retirement benefits repaid in 2013				
Taxable IRA distributions				
Nontaxable IRA distributions				
Total lump sum social security received				
Lump sum taxable social security				
Other federal withholding				
Other state withholding				

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

Other Income:

TSJ	Nature and Source	2013 Amount	2012 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received?	2013 Amount	2012 Amount

Itemized Deductions - Medical and Taxes

Medical and Dental Expenses:

	TSJ	2013 Amount	2012 Amount
Prescription medicines and drugs			
Total medical insurance premiums paid (Do not include medicare premiums paid)			
Long-term care expenses			
Total insurance reimbursement			
Number of miles traveled for medical care			
Lodging			
Doctors, dentists, etc.			
Hospitals			
Lab fees			
Eyeglasses and contacts			
Cobra assistance premiums in 2013			

	2013 Amount	2012 Amount
Taxpayer long-term care insurance premiums paid		
Spouse long-term care insurance premiums paid		

Other Medical Expenses:

TSJ	Description	2013 Amount	2012 Amount

Taxes Paid: Please include copies of your tax bills

	TSJ	2013 Amount	2012 Amount
Personal property taxes paid (include vehicle taxes)			
General sales taxes paid on specified items			

Itemize real estate taxes by state.

TSJ	Real Estate Taxes	2013 Amount	2012 Amount

Other Taxes Paid:

TSJ	Description	2013 Amount	2012 Amount

If you purchased or sold your home in 2013, did you include any taxes from your closing statement in the amounts above? ☐ Yes ☐ No

2013

Itemized Deductions - Mortgage Interest and Points

14A

Mortgage Questions for 2013:

	Yes	No
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below?		
Did you refinance your home? (If Yes, please enclose the closing statement.)		
If Yes, how many years is your new mortgage loan?		
Did you purchase a new home or sell your former home during the year?		
If Yes, please enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you (or your spouse, if married) have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home?		
If Yes, did you (and your spouse, if married at the time of purchase) own and use the same home as a principal residence in the U.S. for any 5 consecutive year period during the 8 year period ending on the purchase date of the new home?		

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid To	Did You Receive Form 1098? Yes	No	2013 Amount	2012 Amount

Other Home Mortgage Interest Paid:

TSJ	Paid To: Name	Address	ID Number	2013 Amount	2012 Amount

Deductible Points:

TSJ	Paid To	Did You Receive Form 1098? Yes	No	2013 Amount	2012 Amount

Mortgage Insurance Premiums:

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2013 Amount	2012 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2013 Amount	2012 Amount

Cash Contributions:

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than $500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity. Attach Forms 1098-C received from the charity.

TSJ	Organization or Description of Contribution	2013 Amount	2012 Amount

TSJ	Conservation Real Property	2013 Amount	2012 Amount
	100% limit		
	50% limit		

TSJ	Description	2013 Miles	2012 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		

Noncash Contributions Totaling $500 or Less:

TSJ	Description of Donated Property	2013 Amount	2012 Amount

Noncash Contributions Totaling More Than $500: Please enclose all Forms 1098-C or other documentation.

TSJ . . . . ____

Description of the donated property . . . . ____

Donee organization name . . . . ____

Donee organization address . . . . ____

Date the property was acquired by the taxpayer . (Mo/Da/Yr) ____

Date the property was donated . . . . (Mo/Da/Yr) ____

Cost or basis of the donated property . . . . ____

Fair market value of the donated property . . . . ____

Which of the following methods was used to determine the fair market value? CAUTION: Generally, contributions in excess of $5,000 of similar property will require an appraisal (does not apply to marketable securities)

☐ Appraisal ☐ Thrift shop value ☐ Catalog ☐ Comparable sale

Other - please explain . . . . ____

Which of the following describes how this donated property was acquired?

☐ Purchase ☐ Gift ☐ Inheritance ☐ Exchange

Miscellaneous Itemized Deductions:

	TSJ	2013 Amount	2012 Amount
Union and professional dues			
Tax preparation fee			
Professional subscriptions			
Hobby expense (To extent of income)			
Safe deposit box			
Uniforms and protective clothing			
Work tools			
Gambling losses			
Estate taxes			

Other Itemized Deductions:

Examples:

- Certain legal and accounting fees
- Investment expenses
- Custodial fees
- Employment agency fees
- Certain educational expenses

TSJ	Description	2013 Amount	2012 Amount

Casualty or Theft Loss:

TSJ . . . . ____

Property description . . . . ____

Which of the following describes the type of property that sustained the casualty or theft loss?

- ☐ Personal use
- ☐ Business use
- ☐ Income producing
- ☐ Employee Use
- ☐ Personal use due to Hurricane Katrina
- ☐ Personal use attributable to a federally declared disaster between 2007 and 2009
- ☐ Personal use attributable to Midwestern disaster area
- ☐ Personal use attributable to Kansas disaster area
- ☐ Personal use attributable to insolvent or bankrupt financial institution losses on deposits

Date acquired . . . . . . (Mo/Da/Yr) ____

Date damaged or lost . . (Mo/Da/Yr) ____

Original cost or other basis . . . . ☐

Fair market value before casualty ☐

Fair market value after casualty ☐

Cost of replacement . . . . ☐

Insurance reimbursement ☐

Employee Business Expenses

TS: ____ **Occupation:** ____

Business Expenses: **Enter all expenses at 100 percent**

If these expenses are to be divided between Schedule A (Itemized Deductions) and one or more businesses, please enter the percentage to apply to Schedule A . . . . ____ %

	2013 Amount	2012 Amount
Parking fees and tolls		
Local transportation		
Travel expenses		
Meals and entertainment		

Other Business Expenses:

Description	2013 Amount	2012 Amount

Reimbursements: **Please list only reimbursements NOT reported in Box 1 of your Form W-2**

	2013 Amount	2012 Amount
Amount received for other expenses		
Amount received for meals and entertainment		

Does your employer's reimbursement plan for meals and entertainment allow for offset of other reimbursements? . . . . ☐ Yes ☐ No

Vehicle:

If these vehicle expenses are to be divided between Schedule A (Itemized Deductions) and one or more businesses, please enter the percentage to apply to Schedule A . . . . ____ %

Description of vehicle . . . . ____

Date vehicle was placed in service . . . . (Mo/Da/Yr) ____

Do you (or your spouse) have another vehicle available for personal purposes? ☐ Yes ☐ No

Was your vehicle available for personal use during off-duty hours? ☐ Yes ☐ No

	2013	2012
Total miles		
Total business miles		
Average daily commuting miles		
Total commuting miles for the year		
Gasoline and oil		
Repairs		
Insurance		
Taxes		
Value of employer provided vehicle		
Temporary vehicle rentals		
Fair market value of leased vehicle		
Vehicle leases		

Other Vehicle Expenses:

Description	2013 Amount	2012 Amount

2013

Employee Business Expenses-
Business Use of Home

17A

Partial Use of Your Home for Business:

	2013	2012
Square footage of home used exclusively for business		
Total square footage of home		
Total hours home was used for day care during the year		

	Yes	No
Was your home used for day care purposes for the entire year?		
Were improvements made to the home and/or home office since the time you began using the home for business?		

Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.
Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.
Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount
Casualty losses				
Deductible mortgage interest paid to:				
Financial institutions				
Individuals				
Real estate taxes				
Insurance				
Qualified mortgage insurance premiums				
Repairs and maintenance				
Utilities				
Rent				

Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount

Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid

Child/Dependent Care Expenses & Education Expenses

Child/Dependent Care Expenses:

General Information:

TSJ . . . .

Were you or your spouse a full time student or disabled? . . . . ☐ Yes ☐ No
Did you pay an individual for services performed in your home? . . . . ☐ Yes ☐ No

Expenses incurred in 2012 but paid in 2013 . . . .
Employer-provided dependent care benefits that were forfeited in 2013 . . . .
2012 carryover used in grace period . . . .

Child/Dependent Care Providers:

Provider 1:

Name . . . .
Street address . . . .
City, state and ZIP code . . . .
Social security number OR . . . .
Employer identification number . . . .
Telephone number (California only) . . . .

	2013 Amount	2012 Amount
Expenses incurred and paid in 2013		
Expenses incurred and not paid in 2013		

Provider 2:

Name . . . .
Street address . . . .
City, state and ZIP code . . . .
Social security number OR . . . .
Employer identification number . . . .
Telephone number (California only) . . . .

	2013 Amount	2012 Amount
Expenses incurred and paid in 2013		
Expenses incurred and not paid in 2013		

Qualifying Persons for Child/Dependent Care Expenses:

First Name and Initial	Last Name	Social Security Number	2013 Expenses Incurred	2012 Expenses Incurred

Higher Education Expenses for Education Credits and/or Tuition Fees Deduction:

Qualified expenses are for post-secondary education tuition and related expenses; they do not include room or board. Include a detailed listing of the expenses.

Please enclose copies of all Forms 1098-T

First Name and Initial	Last Name	Social Security Number	Grade	2013 Qualified Expenses

Federal Tax Payments

Refund Application:

If you have an overpayment of 2013 taxes, do you want the excess:

Refunded	☐ Yes	☐ No
Applied to your 2014 estimated tax liability	☐ Yes	☐ No

Federal Estimated Tax Payments:

		Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2013 1st Quarter Estimate	(Due 04-15-2013)			
2013 2nd Quarter Estimate	(Due 06-17-2013)			
2013 3rd Quarter Estimate	(Due 09-16-2013)			
2013 4th Quarter Estimate	(Due 01-15-2014)			

2012 overpayment applied to 2013 estimate ☐

Tax Planning Information for Tax Year 2014:

Do you expect any of the following to occur in 2014?

	Yes	No
A change in your marital status	☐	☐
A change in the number of your dependents	☐	☐
A substantial change in your income	☐	☐
A substantial change in your withholding	☐	☐
A substantial change in deductions	☐	☐

If you answered Yes to any of the above questions, please provide details.

State and City Tax Payments

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2013 1st Quarter Estimate			
2013 2nd Quarter Estimate			
2013 3rd Quarter Estimate			
2013 4th Quarter Estimate			

2012 overpayment applied to 2013 estimate . . . . . . ☐

Balance of prior year(s)' tax paid in 2013 plus amount paid with 2012 extensions . . . . . . ☐

Estimated tax payments for 2012 paid in 2013 . . . . . . ☐

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2013 1st Quarter Estimate			
2013 2nd Quarter Estimate			
2013 3rd Quarter Estimate			
2013 4th Quarter Estimate			

2012 overpayment applied to 2013 estimate . . . . . . ☐

Balance of prior year(s)' tax paid in 2013 plus amount paid with 2012 extensions . . . . . . ☐

Estimated tax payments for 2012 paid in 2013 . . . . . . ☐

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2013 1st Quarter Estimate			
2013 2nd Quarter Estimate			
2013 3rd Quarter Estimate			
2013 4th Quarter Estimate			

2012 overpayment applied to 2013 estimate . . . . . . ☐

Balance of prior year(s)' tax paid in 2013 plus amount paid with 2012 extensions . . . . . . ☐

Estimated tax payments for 2012 paid in 2013 . . . . . . ☐

2013

Colorado Information

Residency Information:

	Taxpayer From (Mo/Da/Yr)	Taxpayer To (Mo/Da/Yr)	Spouse From (Mo/Da/Yr)	Spouse To (Mo/Da/Yr)
If you did not live in Colorado for all of 2013, enter the dates you did live in Colorado				
Enter the state names other than Colorado where you had income				

Voluntary Contributions:

Enter the amount you wish to contribute on your 2013 tax return to:

Nongame and Endangered Wildlife Cash Fund	
Colorado Domestic Abuse Program Fund	
Homeless Prevention Activities Program Fund	
Multiple Sclerosis Colorado Fund	
Western Slope Military Veterans' Cemetery Fund	
Pet Overpopulation Fund	
Colorado Healthy Rivers Fund	
Colorado Alzheimer's Association Fund	
Military Family Relief Fund	
Colorado Cancer Fund	
Goodwill Industries Fund	
Families in Action for Mental Health Fund	
Unwanted Horse Fund	
Make-A-Wish Foundation of Colorado Fund	
Public Education Fund	

Enter Any Additional Colorado Information: