

Name: _____

Yes No

	Were there any changes to your filing status or number of dependents during 2013?
	Can you or your spouse be claimed as a dependent by someone else?
	Did you incur any childcare expenses?
	Did you have a change in residence or job location during the year?
	Did you move during 2013? From where? _____ Date of move _____
	Did you reside in more than one state during 2013? If yes, which states?
	Did you receive any notices from the IRS or the state taxing agency? If yes, please attach.

Yes No

	Have you received all W-2s from all employers? How many W-2s are attached? _____
	Did you use your vehicle on the job other than for commuting to work?
	Did you have an employer-provided vehicle which you drove home or used personally? If so, enter the lease value \$ _____
	Did you work out of town at any time during the year?
	Did you earn income from a state other than the state in which you live? If yes, what state and how much? _____
	Did you or your spouse receive any tips not reported to your (or your spouses) employer?
	Did you receive any disability income during the year? \$ _____ Attach 1099-R
	Did you have an interest in or signature over a bank or brokerage account in a foreign country? Were you a grantor of or transferor to a foreign trust?
	Did you earn interest from, or are you an authorized signature holder on, a foreign bank account?
	Did you have any income from, or pay taxes to, a foreign country?
	Did you engage in any bartering transactions during 2013?
	Did you surrender any US savings bonds during 2013?
	Did you receive any state or local income tax refunds from prior years?
	Do you or your spouse have any IRA accounts?
	Did you recharacterize any IRAs this year?
	Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
	Did you receive a Schedule K-1 from a partnership, S corporation, or trust? If so, please attach.
	Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099
	Did you receive any type of prize, award, or gambling winnings during 2013?
	Did you receive any of the following: Unemployment Income, Combat pay, Jury Duty and/or Alimony, or Maintenance Received? If so, what and how much? _____
	Did you receive any income not shown in this organizer? If so, please list _____
	Does anyone owe you money that has become uncollectible?

Comments: _____

Name: _____

	Driver's License and social security card (for identity verification)
	Copy of 2012 income tax return
	Original W-2s and other statements of income received from employers
	1099s and other statements reporting interest/dividend/miscellaneous income
	Records of other income received (tips, self-employment, SSI, combined bank reporting statements)
	Cancelled checking/savings slip (for direct deposit/direct debit information)

Concerns to discuss with preparer: _____
