

**STEENERSON & CO., INC.**  
**11493 GRAY ST**  
**WESTMINSTER, CO 80020**  
**(303) 525-4272**

December 30, 2013

\_\_\_\_\_  
\_\_\_\_\_, CO 00000

Dear \_\_\_\_\_,

As 2013 ends and the new year begins, it's time to start thinking about taxes again. We hope 2013 has been a happy and prosperous year for you.

Enclosed is your 2013 Tax Organizer which we will use in preparing your 2013 tax return(s). It summarizes your 2012 tax information and provides space for you to enter your 2013 data. As you receive your 2013 tax documents, please collect them and keep them with this organizer. These documents include such items as your W-2s, Form 1099s, K-1s, brokerage statements, etc. Your check register may also include pertinent information.

Complete only those schedules that apply to you. If you have already prepared other schedules for the necessary information, refer to them in the organizer and enclose them for our use. A fully completed organizer lessens the likelihood of omissions from your tax return.

When you have gathered all your tax information, please mail the tax organizer, along with your various tax forms, in the enclosed envelope. You may also contact our office to set up an appointment to complete your 2013 tax return(s).

We look forward to hearing from you soon. As always, contact us if you have any questions.

Sincerely,

Shelby Steenerson

December 30, 2013

STEENERSON & CO., INC.  
11493 GRAY ST  
WESTMINSTER, CO 80020  
(303) 525-4272

\_\_\_\_\_  
\_\_\_\_\_, CO 00000

Dear \_\_\_\_\_,

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish to us, we will prepare your Federal and applicable state income tax returns for 2013.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return. It is your responsibility to provide all necessary information related to income and deductions and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates. It is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax returns, including but not limited to the auto, travel, entertainment, and related expenses and the required documents to support charitable contributions over \$250. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, or for resulting taxes, penalties and interest.

Our deadline for receiving your tax information in order to file the tax return by April 15, 2014 is no later than March 20, 2014. If we have not received all of your information by March 20, 2014, and your return is not completed by April 10, 2014 we will need you to sign an authorization form for filing an extension (tax returns filed under an extension are due October 15, 2014.) You understand that if an extension is filed it does not extend the time to pay all taxes due. If, after completing the returns, it is determined that a balance is owed you will be subject to late payment penalties and interest charges on the balance due. In addition, You understand that if the request for extension is denied you will be subject to late filing fees as well.

You are responsible for complying with any other country's income reporting and tax filing requirements. We have no responsibility to discuss these issues with you. If you have a specific question(s) regarding your tax filing obligations, please contact us to schedule an appointment to discuss your concerns.

We will use our judgement to resolve questions in your favor where a tax law is unclear if there is a reasonable justification for doing so. Whenever we are aware that an applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g. tax agencies and courts), we will explain the possible positions that may be taken on your return. In accordance with our professional standards, we will follow whatever position you request, as long as it is consistent with the codes, regulations, and interpretations that have been promulgated. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments. In the event, however, that you ask us to take a tax position that in our professional judgement will not meet the applicable laws and standards, we reserve the right to stop work and shall not be liable to you for any damages that occur as a result of ceasing to render services. You agree that you will not and are not entitled to rely on any advice unless your request and our response are provided in writing.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you under separate engagement letter, or to review the results of any examination. Billing for these additional services will be at our standard rates.

If any dispute arises among the parties, they agree to try first in good faith to settle the dispute by mediation administered through CNA, Aon Insurance Services. All unresolved disputes shall then be decided by final and binding arbitration in accordance with the Rule for Professional Accounting and Related Services Disputes. Fees charged by any mediators, arbitrators, or others associated with the mediation shall be shared equally by all parties. In agreeing to arbitration, we both acknowledge that in the event of a dispute each of us is giving up the right to have the dispute decided in a court of law before a judge or jury and instead we are accepting the use of arbitration for resolution.

It is our policy to keep records related to this engagement and copies of your tax return for four years from the date the tax return was e-filed or delivered to the taxpayer, after which we reserve the right to shred/destroy our copies. We suggest that you retain copies of your tax returns for a minimum of seven years. We do not keep any original client records. We will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies. If original tax documents are left at Steenerson & Co., Inc.'s office, they will be retained and kept secure for your pick up for three months from the date the tax return was e-filed or delivered to the taxpayer. If the original documents are not picked up within three months, the taxpayer will either need to arrange to have the documents shipped to the taxpayer at the taxpayer expense or storage fees will be charged at \$20/month. After a period of one year after the date of this signed engagement letter, if the original documents are left at the office of Steenerson & Co., Inc. they will be

destroyed. We will not be responsible for any fees, penalties or interest caused by the destruction of these documents.

Our engagement does not include tax planning services, which are available as a separate engagement. During the course of preparing the tax returns identified above, we may bring to your attention certain available tax saving strategies for you to consider as a possible means of reducing your income taxes in subsequent tax years. However, we have no responsibility to do so, and will take no action with respect to any such recommendations, as the responsibility for implementation remains with you, the taxpayer.

The charges for our services are based on our fee schedule and the complexity of the returns, plus out of pocket expenses. All tax preparation fees must be paid prior to picking up and/or e-filing your returns, without exceptions.

You have the final responsibility for your income tax returns. Please review them carefully before you sign and mail them. You will be required to verify and sign a completed Form 8879 IRS e-file Signature Authorization, and all state equivalent authorization forms **before** your returns can be filed electronically. If your return is filed by mail, it is your responsibility to make sure the return is received by the taxing authorities. Our services will be concluded upon delivery to you, the taxpayer. It is our recommendation that you mail all returns via Certified mail.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return this letter and retain a copy for your records. By your signature below, you acknowledge and agree that upon the expiration of four years from the date the tax return is e-filed or delivered to taxpayer, Steenerson & Co., Inc. and all employees or associates shall be free to destroy our records related to this engagement.

---

Shelby Steenerson

Accepted by:

---

Client signature

---

Client signature

---

Date

_____
_____
_____, CO 00000

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2013 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2013 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2012 information is included for your reference. You do not need to make any 2012 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2012 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

STEENERSON & CO., INC.  
 11493 GRAY ST  
 WESTMINSTER, CO 80020  
 Telephone: (303)525-4272 Fax: (303)469-5828  
 E-mail: shelby@cpafirm4u.com

# Table of Contents

ORG1

Description	Page
Cover Sheet .....	ORG0
Topic Index .....	ORG2
General Questions.....	ORG3
Business/Investment Questions.....	ORG4
Additional Information .....	ORG5
Basic Taxpayer Information.....	ORG6
W-2, W-2G, 1099-R Income.....	ORG7
1099-MISC Income .....	ORG8
Social Security Benefits/Form 1099-G/Other Income .....	ORG10
Interest and Dividend Income .....	ORG11
Seller Financed Interest/Child's Interest and Dividends .....	ORG12
Medical and Tax Expenses .....	ORG13
Interest Paid and Cash Contributions .....	ORG14
Non-Cash Charitable Contributions.....	ORG14A
Miscellaneous Itemized Deductions .....	ORG15
Moving Expenses.....	ORG16
Employee Business Expenses .....	ORG17
Employee Home Office Expense .....	ORG17A
Car and Truck Expenses .....	ORG18
Business Income and Expenses .....	ORG19
Business Use of Home .....	ORG20
Sales of Stocks and Securities.....	ORG21
Sale of Your Home .....	ORG22
Installment Sales Income .....	ORG23
Sales of Business Property .....	ORG24
Rental and Royalty Income and Expenses.....	ORG25
Farm Rental Income and Expenses .....	ORG26
Farm Income and Expenses.....	ORG27
Adjustments to Income .....	ORG28
Dependent Care Expenses.....	ORG35
Education .....	ORG36
Tax Payments.....	ORG40
Household Employment Taxes .....	ORG41
K-1 Partnership – Partner's Questions.....	ORG45
K-1 S-Corporation – Shareholder's Questions .....	ORG46
K-1 Estate & Trust – Beneficiary's Questions.....	ORG47
K-1 Partnership Supplemental Business Expense.....	ORG48
Transferred Assets .....	ORG50
Additional Assets .....	ORG51
Foreign Earned Income.....	ORG52
State Information Worksheet .....	ORG60

## Topic Index

**ORG2**

<p>Alimony paid ..... ORG28</p> <p>Alimony received ..... ORG10</p> <p>Annuity payments received ..... ORG7</p> <p>Business income and expenses ..... ORG19</p> <p>Car and truck expenses ..... ORG18</p> <p>Casualties and thefts..... ORG3</p> <p>Charitable contributions ..... ORG14</p> <p>Child and dependent care expenses ..... ORG35</p> <p>Dependent information ..... ORG6</p> <p>Depreciable property - additions ..... ORG51</p> <p>Depreciable property - deletions ..... ORG50</p> <p>Dividend income ..... ORG11</p> <p>Education ..... ORG36</p> <p>Employee business expense ..... ORG17</p> <p>Estate income ..... ORG47</p> <p>Estimated and other tax payments ..... ORG40</p> <p>Farm income and expenses ..... ORG27</p> <p>Farm rental income and expenses ..... ORG26</p> <p>Foreign earned income ..... ORG52</p> <p>Gambling and lottery winnings ..... ORG7</p> <p>Household employees ..... ORG41</p> <p>Installment sales ..... ORG23</p> <p>Interest income ..... ORG11</p> <p>Interest paid (mortgage, etc) ..... ORG14</p> <p>Investment interest expense ..... ORG14</p> <p>IRA contributions ..... ORG28</p> <p>IRA distributions and rollovers ..... ORG7</p>	<p>Keogh plan contributions ..... ORG28</p> <p>Medical and dental expenses ..... ORG13</p> <p>Miscellaneous income reported on 1099-MISC ..... ORG8</p> <p>Miscellaneous income not from 1099-MISC ..... ORG10</p> <p>Miscellaneous itemized deductions ..... ORG15</p> <p>Moving expenses ..... ORG16</p> <p>Office in home expenses ..... ORG20</p> <p>Partnership income ..... ORG45</p> <p>Pension payments received ..... ORG7</p> <p>Personal information ..... ORG6</p> <p>Railroad retirement benefits ..... ORG10</p> <p>Rental income and expenses ..... ORG25</p> <p>Royalty income and expenses ..... ORG25</p> <p>S corporation income ..... ORG46</p> <p>Sale of home ..... ORG22</p> <p>Sales of business property ..... ORG24</p> <p>Sales of stock, securities ..... ORG21</p> <p>Self-employed health insurance ..... ORG19</p> <p>SEP plan contributions ..... ORG28</p> <p>SIMPLE plan contributions ..... ORG28</p> <p>Social security benefits ..... ORG10</p> <p>State and local tax refunds ..... ORG10</p> <p>Taxes paid ..... ORG13</p> <p>Trust income ..... ORG47</p> <p>Unemployment compensation ..... ORG10</p> <p>Wages and salaries ..... ORG7</p>
---	---

General Questions

ORG3

PERSONAL INFORMATION

Yes No

- 1 Did your marital status change during 2013?
If yes, explain
2 Do you want to allow your tax preparer to discuss this year's return with the IRS?
If no, enter another person (if desired) to be allowed to discuss this return with the IRS.
Caution: Review any transferred information for accuracy.
Designee's Name
Phone Number
Personal Identification Number (5 digit PIN)
3 Do you or your spouse plan to retire in 2014?
4 Were you or your spouse permanently and totally disabled in 2013?
5 Enter date of death for taxpayer or spouse (if during 2013 or 2014 ): Taxpayer: Spouse:
6 Were you or your spouse a member of the U.S. Armed Forces during 2013 ?

DEPENDENT INFORMATION

Yes No

- 7a Do you have dependents who must file?
b If yes, do you want us to prepare the return(s)?
8a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,000?
b If yes, do you want to include your child's income on your return?
9 Are any of your dependents not U.S. citizens or residents?
10 Did you provide over half the support for any other person during 2013?
11 Did you incur adoption expenses during 2013 ?

IRA, PENSION AND EDUCATION SAVINGS PLANS

Yes No

- 12 Did you receive payments from a pension or profit-sharing plan?
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?
14a Did you convert all or part of a regular IRA into a Roth IRA?
b Did you roll over all or part of a qualified plan into a Roth IRA?
15 Did you contribute to a Coverdell Education Savings Account?

ITEMS RELATED TO INCOME/LOSSES

Yes No

- 16 Did you receive any disability payments in 2013 ?
17 Did you receive tip income not reported to your employer?
18a Did you buy, sell, refinance, or abandon a principal residence or other real property in 2013 ?
(Attach copies of any escrow statements or Forms 1099.)
b If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?
c Are you planning to purchase a home soon?
19 Did you incur any casualty or theft losses during 2013 ?
20 Did you incur any non-business bad debts?

PRIOR YEAR TAX RETURNS

Yes No

- 21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return?
If yes, enclose agent's report or notice of change.
22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?

**General Questions (continued)**

**ORG3**

**FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES**

	Yes	No
23 Did you have foreign income or pay any foreign taxes in 2013 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
24a At any time during 2013, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2013? Report all interest income on Org 11 .....	<input type="checkbox"/>	<input type="checkbox"/>
25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
26 Did you at any time during 2013, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year? .....	<input type="checkbox"/>	<input type="checkbox"/>

**HEALTH AND LIFE INSURANCE**

	Yes	No
27a Did you or your spouse have self-employed health insurance? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job? .....	<input type="checkbox"/>	<input type="checkbox"/>
28 Did you have health insurance? .....	<input type="checkbox"/>	<input type="checkbox"/>
29 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? .....	<input type="checkbox"/>	<input type="checkbox"/>
30 Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....	<input type="checkbox"/>	<input type="checkbox"/>

**MISCELLANEOUS**

	Yes	No
31 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2013? If <b>yes</b> , please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
32 Did you start paying mortgage insurance premiums in 2013? If <b>yes</b> , please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
33 Did you purchase a motor vehicle or boat during 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , attach documentation showing sales tax paid.		
34 Did you purchase an energy efficient vehicle in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , enter year, make, model, and date purchased: _____		
35 Did you donate a vehicle in 2013? If yes, attach Form 1098C .....	<input type="checkbox"/>	<input type="checkbox"/>
36 What was the sales tax rate in your locality in 2013? _____ % State ID .....		
37 Did you or your spouse make gifts of over \$14,000 to an individual or contribute to a prepaid tuition plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
38 Did you make gifts to a trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
39 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach details.		
40 Did you or your spouse participate in a medical savings account in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
41 Did you make a loan at an interest rate below market rate? .....	<input type="checkbox"/>	<input type="checkbox"/>
42 Did you pay any individual for domestic services in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
43 Did you pay interest on a student loan for yourself, your spouse, or your dependents? .....	<input type="checkbox"/>	<input type="checkbox"/>
44 Did you, your spouse, or your dependents attend post-secondary school in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
45 Did a lender cancel any of your debt in 2013? (Attach any Forms 1099-A or 1099-C) .....	<input type="checkbox"/>	<input type="checkbox"/>
46 Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach information.		

**ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND**

	Yes	No
47 If your tax return is eligible for Electronic Filing, would you like to file electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
48 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit? .....	<input type="checkbox"/>	<input type="checkbox"/>

**Caution:** Review transferred information for accuracy.

49 If **yes**, please provide the following information:

a Name of your financial institution .....	_____
b Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....	_____
c Account number .....	_____
d What type of account is this? .....	Checking <input type="checkbox"/> Savings <input type="checkbox"/>

Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

**Business/Investment Questions**

**ORG4**

	Yes	No
<b>1</b> Did you receive stock from a stock bonus plan with your employer? ..... (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>2</b> Did you buy or sell any stocks or bonds in 2013? ..... If <b>yes</b> , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did you surrender any U.S. savings bonds during 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>6</b> Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> Do you have any investments for which you were <b>not</b> personally 'at risk' (other than sole proprietorship or farm)? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>8</b> Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Did you sell property or equipment on installment in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>10</b> Did you have any business related educational expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b> Did you do a 'like-kind' exchange of property in 2013? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>12</b> Do you have records, as described below, to support expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: <b>1</b> Amount; <b>2</b> Time and place; <b>3</b> Date; <b>4</b> Business purpose; <b>5</b> Description of gift(s); and <b>6</b> Business relationship of recipient.		
<b>13</b> Did you purchase special fuels for non-highway use? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please list the type of use and the number of gallons for each fuel. _____ _____ _____ _____		
<b>14</b> Was Form 8903 (Domestic Production Activities Deduction) included in your 2012 federal income tax return? .....	<input type="checkbox"/>	<input type="checkbox"/>

# Basic Taxpayer Information

ORG6

## PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name .....	_____	_____
First name .....	_____	_____
Middle initial and suffix .....	MI ..... _____ Suffix ..... _____	MI ..... _____ Suffix ..... _____
Social security number .....	_____	_____
Occupation.....	_____	_____
Work phone/extension .....	_____	_____
Cell phone .....	_____	_____
E-mail address.....	_____	_____
Birthdate .....	MM/DD/YYYY ..... _____	MM/DD/YYYY ..... _____
Blind .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contribute to Presidential Election Campaign Fund .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Street address.....	_____	Apartment number ..... _____
City.....	_____ State..... <u>CO</u>	ZIP code..... <u>00000</u>
Home phone.....	_____ Foreign country .....	_____
Fax.....	_____ Foreign phone .....	_____

## FILING STATUS

**1** Single  
 **2** Married filing jointly  
 **3** Married filing separately  
     Check this box if you **did not** live with spouse at any time during the year .....   
     Check this box if you are eligible to claim spouse's exemption .....   
     Check this box if your spouse itemizes deductions.....   
 **4** Head of household  
     If the qualifying person is a child but not your dependent, enter  
     Child's name..... \_\_\_\_\_ Child's social security number..... \_\_\_\_\_  
 **5** Qualifying widow(er)  
     Check the box for the year the spouse died ..... 2011  2012

## DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)	Social Security Number	**Code	Date of Birth	2013 Child Care Expense
	Relationship	+Months in U.S.	*Not Citizen	2012 Child Care Expense
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

**\*\*** For the Dependent Code, enter the following: L = dependent child who lived with you  
 N = dependent child who didn't live with you due to divorce or separation  
 O = other dependent  
 Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)  
**+** Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.  
**\*** Check this box if dependent child is not a U.S. citizen or resident alien

**W-2 – WAGES, SALARIES, TIPS, AND OTHER COMPENSATION**

**Attach all copies of your W-2 forms here.**

<b>1</b>	Employer's name .....	Check if not applicable for 2013 .....	<input type="checkbox"/>
	Employer's name .....	Check if for spouse .....	<input type="checkbox"/>
	<b>1</b> Check if this employer hired an on-staff care provider or furnished dependent care at your workplace .....		<input type="checkbox"/>
	<b>2</b> Enter any amounts forfeited from a flexible spending account .....		_____
	<b>3</b> Check if the income reported is from a foreign source .....		<input type="checkbox"/>
	<b>4 a</b> Clergy: Enter your designated housing or parsonage allowance .....		_____
	<b>b</b> Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value.....		_____
	<b>c</b> Check SE tax on: <b>(a)</b> housing or parsonage allowance..... <input type="checkbox"/>	<b>(b)</b> W-2 wages..... <input type="checkbox"/>	<b>(c)</b> both..... <input type="checkbox"/>

<b>2</b>	Employer's name .....	Check if not applicable for 2013 .....	<input type="checkbox"/>
	Employer's name .....	Check if for spouse .....	<input type="checkbox"/>
	<b>1</b> Check if this employer hired an on-staff care provider or furnished dependent care at your workplace .....		<input type="checkbox"/>
	<b>2</b> Enter any amounts forfeited from a flexible spending account .....		_____
	<b>3</b> Check if the income reported is from a foreign source .....		<input type="checkbox"/>
	<b>4 a</b> Clergy: Enter your designated housing or parsonage allowance .....		_____
	<b>b</b> Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value.....		_____
	<b>c</b> Check SE tax on: <b>(a)</b> housing or parsonage allowance..... <input type="checkbox"/>	<b>(b)</b> W-2 wages..... <input type="checkbox"/>	<b>(c)</b> both..... <input type="checkbox"/>

**1099-R – DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC**

**Attach all copies of your 1099-R forms here.**

<b>1</b>	Payer's name.....	Check if not applicable for 2013 .....	<input type="checkbox"/>	
	Payer's name.....	Check if for spouse .....	<input type="checkbox"/>	
	<b>1</b> Check if either box applies: Rollover .....	<input type="checkbox"/>	Conversion to Roth IRA .....	<input type="checkbox"/>
	<b>2 a</b> If a <b>partial</b> rollover, enter the amount rolled over .....		_____	
	<b>b</b> If a <b>partial</b> conversion to a Roth IRA, enter the amount converted to Roth IRA .....		_____	
	<b>3</b> Health insurance premiums deductible on Schedule A.....		_____	
	<b>4 a</b> If entire distribution is a Required Minimum Distribution (RMD), check this box .....		<input type="checkbox"/>	
	<b>b</b> If <b>only part</b> of distribution is RMD, enter the part that is RMD.....		_____	

<b>2</b>	Payer's name.....	Check if not applicable for 2013 .....	<input type="checkbox"/>	
	Payer's name.....	Check if for spouse .....	<input type="checkbox"/>	
	<b>1</b> Check if either box applies: Rollover .....	<input type="checkbox"/>	Conversion to Roth IRA .....	<input type="checkbox"/>
	<b>2 a</b> If a <b>partial</b> rollover, enter the amount rolled over .....		_____	
	<b>b</b> If a <b>partial</b> conversion to a Roth IRA, enter the amount converted to Roth IRA .....		_____	
	<b>3</b> Health insurance premiums deductible on Schedule A.....		_____	
	<b>4 a</b> If entire distribution is a Required Minimum Distribution (RMD), check this box .....		<input type="checkbox"/>	
	<b>b</b> If <b>only part</b> of distribution is RMD, enter the part that is RMD.....		_____	

**W-2G – GAMBLING OR LOTTERY WINNINGS**

**Attach all copies of your W-2G forms here.**

Name of Payer	Check if Spouse	Gross Winnings (Box 1)	Federal Tax Withheld (Box 2)	State Tax Withheld (Box 14)	State Code (Box 13)
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

W-2 Amounts

ORG7A

WAGES, SALARIES, TIPS, AND OTHER COMPENSATION			
Box	Description	2013	2012
<b>c</b>	Employer's name (from ORG7) .....		
<b>1</b>	Wages, tips, etc.....		
<b>2</b>	Federal income tax withheld.....		
<b>3</b>	Social security wages.....		
<b>4</b>	Social security tax.....		
<b>5</b>	Medicare wages/tips .....		
<b>6</b>	Medicare tax withheld.....		
<b>13b</b>	Check if retirement plan participant.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b>	Social security tips .....		
<b>8</b>	Allocated tips.....		
	Unreported tips less than \$20 per month .....		
	Unreported tips \$20 or more per month .....		
<b>9</b>	(Not used).....		
<b>10</b>	Dependent care .....		
<b>11</b>	Nonqualified plans.....		
<b>13a</b>	Check if statutory employee .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>13c</b>	Check if third-party sick pay .....	<input type="checkbox"/>	<input type="checkbox"/>

Box 12 W-2 Code	2013 Box 12 Amount	2012 Box 12 Amount		2013	2012
			If Box 12 code is:		
			A: Attributable to RR Tier 2 tax.....		
			M: Attributable to RR Tier 2 tax.....		
			R: Taxpayer MSA .....		
			Spouse MSA .....		
			G: Not government employer .....	<input type="checkbox"/>	<input type="checkbox"/>

2013 Box 14 Description or Code	2013 Box 14 Amount	2012 Box 14 Description or Code	2012 Box 14 Amount

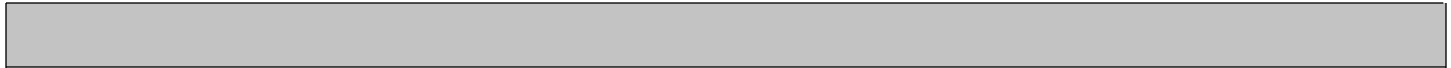
Box 15 State	2013 Box 16 Wages, tips, etc	2013 Box 17 Income tax	2012 Box 16 Wages, tips, etc	2012 Box 17 Income tax

Box 20 Locality	2013 Box 18 Wages, tips, etc	2013 Box 19 Income tax	2012 Box 18 Wages, tips, etc	2012 Box 19 Income tax

# 1099-R Amounts

**ORG7B**

Source From:    1099-R .....       CSA-1099-R .....       CSF-1099-R .....       RRB-1099-R.....



Payer's name.....

Box	Description	2013	2012
		<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Federal income tax withheld.....		
	▶	<input type="checkbox"/>	<input type="checkbox"/>
	▶	<input type="checkbox"/>	<input type="checkbox"/>
	▶ Check if a <b>qualified</b> Roth IRA distribution, but box 7 code is J or T, <b>not code Q</b>	<input type="checkbox"/>	<input type="checkbox"/>
	▶ If a fully taxable disability pension, check if recipient is under the minimum retirement age .....	<input type="checkbox"/>	<input type="checkbox"/>
	State tax withheld – State 1.....		
	State tax withheld – State 2.....		
	State/Payer's state number – State 1 .....		
	State/Payer's state number – State 2 .....		
	State distribution – State 1 .....		
	State distribution – State 2.....		
	Local tax withheld – Locality 1.....		
	Local tax withheld – Locality 2.....		
	Name of locality – Locality 1 .....		
	Name of locality – Locality 2.....		
	Local distribution – Locality 1 .....		
	Local distribution – Locality 2.....		
	<b>Inherited IRA</b> If this distribution is from an inherited IRA, indicate the distribution is from the IRA of		
	▶ Spouse and treat as recipient's own (treat as rollover).....	<input type="checkbox"/>	<input type="checkbox"/>
	▶ Recipient, but originally was inherited from spouse's (own IRA).....	<input type="checkbox"/>	<input type="checkbox"/>
	▶ Spouse and not treat as recipient's own (taxable amount in box 2a) .....	<input type="checkbox"/>	<input type="checkbox"/>
	▶ Someone other than a spouse (taxable amount in box 2a) .....	<input type="checkbox"/>	<input type="checkbox"/>

1099-MISC Income

ORG8

**MISCELLANEOUS INCOME**

Attach all copies of 1099-MISC forms here.

Box	Description	Payer 1	Payer 2	Payer 3
	Check if spouse .....			
	Check if you did not receive income from this payer in 2013 .....			
	Payer's name .....			
	Payer's federal identification number <b>or</b> .....			
	Payer's social security number .....			
1	Rents .....			
2	Royalties .....			
3	Other income .....			
4	Federal income tax withheld .....			
5	Fishing boat proceeds .....			
6	Medical/health care payments .....			
7	Nonemployee compensation .....			
8	Substitute payments .....			
10	Crop insurance proceeds .....			
11	Foreign Tax Withheld .....			
12	Foreign Country .....			
13	Excess golden parachute payments .....			
14	Gross proceeds paid to an attorney .....			
15a	Section 409A deferrals .....			
15b	Section 409A income .....			
16	State tax withheld – 1st state .....			
17	State name – two letters – 1st state .....			
	Payer's state number – 1st state .....			
18	State income – 1st state .....			
16	State tax withheld – 2nd state .....			
17	State name – two letters – 2nd state .....			
	Payer's state number – 2nd state .....			
18	State income – 2nd state .....			

ORG8

**Social Security Benefits/Form 1099-G/Other Income**

ORG10

**SOCIAL SECURITY BENEFITS**

<input checked="" type="checkbox"/> <b>Attach all copies of SSA and RRB forms.</b>	<b>Taxpayer</b>	<b>Spouse</b>
1 Social Security Benefits from Form SSA-1099.....		
2 Federal income tax withheld from Form SSA-1099 .....		
3 Medicare B premiums withheld from Form SSA-1099 .....		
4 Medicare C premiums withheld from Form SSA-1099 .....		
5 Medicare D premiums withheld from Form SSA-1099 .....		
6 Railroad Retirement Benefits from Form RRB-1099 .....		
7 Federal income tax withheld from Form RRB-1099 .....		
8 Medicare premiums withheld from Form RRB-1099.....		

**FORM 1099-G**

**Attach all copies of 1099-G forms.**

Box	Description	Payer 1	Payer 2	Payer 3
	Check if Spouse .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Check if Joint.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payer's name.....			
1	Unemployment compensation.....			
a	Unemployment benefits you repaid in 2013 .....			
2	State and local income tax refunds .....			
3	Enter the tax year from 1099-G box 3 .....			
a	If tax year is 2012 or prior, enter the taxable portion of the amount reported in box 2 .....			
4	Federal income tax withheld.....			
5	RTAA payments.....			
6	Taxable grants .....			
7	Agriculture payments .....			
8	Check if box 2 amount is from trade or business .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Market gain .....			
10a	Two-letter state abbreviation .....	_____	_____	_____
	Two or three-letter local abbreviation .....	_____	_____	_____
b	State identification number .....			
11	State income tax withheld.....			

**OTHER INCOME**

Nature and Source	2013 Taxpayer	2013 Spouse	2012 Combined
1 Alimony received .....			
2 Recovery of bad debts previously deducted .....			
3 Jury duty pay.....			
4 Gambling winnings not reported on W2G/1099 .....			
5 Income from not for profit activities (hobbies) .....			
6 Income from the rental of personal property .....			
7 Other miscellaneous income items: Description:			
_____			
_____			
_____			



**1099-INT Amounts**

**ORG11A**

Box	Form 1099-INT	2013	2012
	<b>Payer Name</b> .....		
<b>2</b>	Early withdrawal penalty .....		
<b>4</b>	Federal taxes withheld .....		
<b>5</b>	Investment expenses .....		
<b>6</b>	Foreign taxes paid .....		
<b>7</b>	Foreign country .....		
<b>9</b>	Private activity bond interest .....		
	Percent of private activity bond amount included in total interest .....		
<b>11</b>	State (postal code) .....		
<b>12</b>	State ID .....		
<b>13</b>	State taxes withheld .....		
<b>11a</b>	State (postal code) .....		
<b>12a</b>	State ID .....		
<b>13a</b>	State taxes withheld .....		
	Types of adjustments:*		
	<input type="checkbox"/> N <input type="checkbox"/> O <input type="checkbox"/> B <input type="checkbox"/> A <input type="checkbox"/> H <input type="checkbox"/> U		
	Amount of adjustment .....		

\*Type of adjustment:  
 N = Nominee distribution  
 O = Original issue discount (OID) adjustment  
 B = Amortizable bond premium (ABP) adjustment  
 A = Accrued interest adjustment  
 H = Other adjustment  
 U = U.S. Savings bond interest previously reported

**1099-DIV Amounts**

**ORG11B**

Box	Form 1099-DIV	2013	2012
	<b>Payer Name</b> .....		
<b>2b</b>	Unrecaptured Section 1250 gain .....		
<b>2c</b>	Section 1202 gain .....		
<b>2d</b>	Collectibles (28%) gain .....		
<b>3</b>	Nondividend distributions (Nontaxable distributions) .....		
<b>4</b>	Federal taxes withheld .....		
<b>5</b>	Investment expenses .....		
<b>6</b>	Foreign tax paid .....		
<b>7</b>	Foreign country .....		
<b>10</b>	Exempt-interest dividends (not included in box 1 or box 3) .....		
<b>11</b>	Private activity bond amount included above .....		
	<b>OR</b>		
	Percent of private activity bond amount included in total exempt-interest dividends (Enter 75 percent as 75.00) .....		
<b>12</b>	State taxes withheld .....		
<b>13</b>	State (postal code) .....		
<b>14</b>	State ID .....		
<b>12a</b>	State taxes withheld .....		
<b>13a</b>	State (postal code) .....		
<b>14a</b>	State ID .....		
	U.S. government interest in dividends .....		
	Margin interest paid in 2013 .....		
	Types of adjustments: Nominee <input type="checkbox"/> Other <input type="checkbox"/> ESOP <input type="checkbox"/>		
	Amount of adjustment .....		

## Medical and Tax Expenses

ORG13

MEDICAL AND DENTAL EXPENSES	2013	2012
1 Prescription medications .....		
2 Health insurance premiums (enter Medicare B on ORG10).....		
3 Qualified long-term care premiums		
<b>a</b> Taxpayer's gross long-term care premiums .....		
<b>b</b> Spouse's gross long-term care premiums .....		
<b>c</b> Dependent's gross long-term care premiums .....		
4 Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity.....		
5 Insurance reimbursement.....		
6 Doctors, dentists, etc .....		
7 Hospitals, clinics, etc .....		
8 Lab and X-ray fees.....		
9 Expenses for qualified long-term care.....		
10 Eyeglasses and contact lenses .....		
11 Medical equipment and supplies .....		
12 Miles driven for medical purposes.....		
13 Ambulance fees and other medical transportation costs .....		
14 Lodging.....		
15 Other medical and dental expenses:		
<b>a</b> _____		
<b>b</b> _____		
<b>c</b> _____		
<b>d</b> _____		
<b>e</b> _____		
<b>f</b> _____		
<b>g</b> _____		
<b>h</b> _____		
<b>i</b> _____		
<b>j</b> _____		
TAXES	2013	2012
Enter state and local income taxes on <b>ORG7</b> , <b>ORG8</b> , <b>ORG10</b> , and <b>ORG40</b> .		
16 Real estate taxes paid on principal residence .....		
17 Real estate taxes paid on additional homes or land .....		
18 Auto registration fees based on the value of the vehicle.....		
19 Other personal property taxes .....		
20 Other taxes:		
_____		
_____		

## Noncash Contributions

ORG14A

Copy 1

Name of Donee Organization	Check if Statement Exists for Gifts of \$250 or More	Fair Market Value	Prior Year Fair Market Value
A _____			
B _____			
C _____			
D _____			
E _____			
F _____			
G _____			
H _____			
I _____			

**Note:** Complete sections below **only** if the **total** noncash contributions are **more than \$500**.

Description of Donated Property	Type**	Address of Donee Organization
A _____		
B _____		
C _____		
D _____		
E _____		
F _____		
G _____		
H _____		
I _____		

Method for Fair Market Value*	Date of Contribution	Complete these columns <b>only</b> for each contribution over \$500		
		Date Acquired (month, year)	How Acquired***	Your Cost
A _____				
B _____				
C _____				
D _____				
E _____				
F _____				
G _____				
H _____				
I _____				

**\*Methods of determining FMV:**

- |               |                          |                   |             |
|---------------|--------------------------|-------------------|-------------|
| Appraisal     | Capitalization of income | Present value     | Thrift shop |
| Average share | Comparative sales        | Replacement cost  |             |
| Catalog       | Consignment shop         | Reproduction cost |             |

**\*\*Type of Donated Property**

- |                                 |                                   |  |
|---------------------------------|-----------------------------------|--|
| Household/clothing items        | Business equipment                | Intellectual property                  |
| Motor vehicle, boat or airplane | Business inventory                | Real property, conservation property   |
| Art, other than self-created    | Stock, publicly traded            | Real property, other than conservation |
| Art, self-created               | Stock, other than publicly traded | Other personal property                |
| Collectibles                    | Securities, other than stock      | Other intangible property              |

**\*\*\*How Property was Acquired:** Purchase, Gift, Inheritance, Exchange

**Miscellaneous Itemized Deductions**

**ORG15**

<b>MISCELLANEOUS DEDUCTIONS (2% LIMITATION)</b>		<b>2013</b>	<b>2012</b>
<b>Employee Business Expenses</b>			
<b>Note:</b> If you have any travel, transportation, meals or entertainment expenses <b>or</b> your employer reimbursed you for <b>any</b> of your job-related expenses, complete <b>ORG17</b> for <b>all</b> your employee expenses.			
<b>1</b>	Union and professional dues .....		
<b>2</b>	Professional subscriptions .....		
<b>3</b>	Uniforms and protective clothing .....		
<b>4</b>	Job search costs .....		
<b>5</b>	Other unreimbursed employee expenses:		
<b>a</b>	_____		
<b>b</b>	_____		
<b>c</b>	_____		
<b>d</b>	_____		
<b>e</b>	_____		
<b>Other Expenses Subject to the 2% Limitation</b>			
Treat all MACRS assets for this activity as qualified Indian reservation property? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No			
Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... <input type="checkbox"/> Regular <input type="checkbox"/> Extension <input type="checkbox"/> No			
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No			
Was this property located in a Qualified Disaster Area? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No			
Check to code assets as Investment Expense ..... <input type="checkbox"/>			
Use <b>ORG50</b> to record dispositions.			
Use <b>ORG51A</b> to enter additional assets.			
Use <b>ORG11a</b> for investment expenses related to interest income.			
Use <b>ORG11b</b> for investment interest related to dividend income.			
<b>6</b>	Tax return preparation fees .....		
<b>7</b>	Investment counsel and advisory fees .....		
<b>8</b>	Certain attorney and accounting fees .....		
<b>9</b>	Safe deposit box rental .....		
<b>10</b>	IRA custodial fees .....		
<b>11</b>	Other expenses (list):		
<b>a</b>	_____		
<b>b</b>	_____		
<b>c</b>	_____		
<b>d</b>	_____		
<b>e</b>	_____		
<b>OTHER MISCELLANEOUS DEDUCTIONS</b>		<b>2013</b>	<b>2012</b>
<b>12</b>	Federal estate tax paid on income in respect of a decedent .....		
<b>13</b>	Amortizable bond premiums (acquired before 10/23/86) .....		
<b>14</b>	Gambling losses (to the extent of gambling income) .....		
<b>15</b>	Claim repayments .....		
<b>16</b>	Unrecovered investment in annuity .....		

**Interest Paid and Cash Contributions**

ORG14

HOME MORTGAGE INTEREST PAID			
Lender's Name	Check if NOT on Form 1098	2013	2012
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME		
Lender's Name	Check if NOT on Form 1098	2013
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

SELLER FINANCED MORTGAGE		
Individual's Name	Identifying Number	Address
		.....
		.....

OTHER PERSON RECEIVING FORM 1098	
Form 1098 Recipient's Name	Address
	.....
	.....

OTHER POINTS					
Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.					
Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2012 Points Deducted
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

INVESTMENT INTEREST		
	2013	2012
Investment interest (for example: margin interest, interest paid on loans used for property held for investment, etc) .....		

**Interest Paid and Cash Contributions (continued)**

**ORG14**

**LIMITED HOME MORTGAGE DEDUCTION**

If your mortgage balance exceeded \$1 million (\$500,000 for married filing separately) or your home equity debt exceeded \$100,000 (\$50,000 for married filing separately) during 2013 complete the following:

	Loan 1	Loan 2	Loan 3	Loan 4	Loan 5
<b>1</b> Interest paid in 2013 .....					
Points paid in 2013.....					
Months loan outstanding ....					
Principal pd on loan in 2013.					
<b>2</b> Home acquisition debt:					
Beginning of year balance ..					
Additional borrowed in 2013 ..					
<b>3</b> Home equity debt:					
Beginning of year balance ..					
Additional borrowed in 2013 ..					
<b>4</b> Grandfathered debt: (before 10/14/1987)					
Beginning of year balance ..					
Additional borrowed in 2013 ..					
<b>5</b> Fair market value of homes on date debt was last secured by home .....					
<b>6</b> Home acquisition and grandfathered debt on date last secured by home .....					

**CASH CONTRIBUTIONS**

Name of Donee Organization	Check if Statement Exists for Gifts \$250 or More	2013	2012
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

Charitable miles driven.....		
Miles driven to deliver noncash contributions .....		
Parking fees, tolls, and local transportation.....		

## Business Income and Expenses

**ORG19**

### GENERAL INFORMATION

1 Check ownership .....  **Taxpayer**     **Spouse**     **Joint**

2 Business name .....

3 a Business street address.....

**b 1** City, State and Zip Code, or .....

**2** Foreign country.....

4 Principal business/profession .....   1  

5 Employer ID number.....

6 Business code (**Preparer Use Only**) .....

7 Was this business fully disposed of in a fully taxable transaction during 2013?.....  **Yes**     **No**

8 Accounting method:  
     Cash       Accrual       Other (specify)  .....

9 Method used to value closing inventory:  
     Cost       Lower of       Other (explain)  .....

    cost or market

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory?  
     (If yes, attach explanation) .....

11 Did you materially participate in the operation of this business during 2013? .....

12 Did you start or acquire this business during 2013? .....

13 a Did you make any payments in 2013 that require you to file Forms 1099? .....

**b** If yes, did you or will you file all the required Forms 1099? .....

14 At-risk determination:  
     **a** Is all of the investment in this activity at risk? .....

**b** Is some of the investment in this activity not at risk? .....

15 Did you have unallowed passive losses in 2012? .....

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? .....

**b** Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... **Regular**     **Extension**     **No**

**c** Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....

**d** Was this business located in a Qualified Disaster Area? .....

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2013	2012
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund) .....		

COST OF GOODS SOLD – IF APPLICABLE	2013	2012
20 Inventory at beginning of year .....		
21 Purchases .....		
22 Items withdrawn for personal use .....		
23 Cost of labor (do not include your salary) .....		
24 Materials and supplies .....		
25 Other costs .....		
26 Inventory at end of year.....		

**Business Income and Expenses (continued)**

**ORG19**

EXPENSES	2013	2012
Business name _____		
<b>27</b> Advertising .....		
<b>28</b> Car and truck expenses (complete ORG18).....		
<b>29</b> Commissions and fees .....		
<b>30</b> Contract labor .....		
<b>31</b> Depletion .....		
<b>32</b> Depreciation and Section 179 deduction ( <b>Preparer Use Only</b> ).....		
<b>33</b> Employee benefit programs:		
<b>a</b> Employee health insurance premiums .....		
<b>b</b> Other employee benefit programs .....		
<b>34</b> Insurance (other than health).....		
<b>35</b> Self-employed health insurance attributable to this business.....		
<b>36</b> Interest:		
<b>a</b> Mortgage paid to banks not reported to you on Form 1098.....		
<b>b</b> Other .....		
<b>37</b> Legal and professional services .....		
<b>38</b> Office expenses .....		
<b>39</b> Pension and profit-sharing plans.....		
<b>40</b> Rent or lease:		
<b>a</b> Machinery and equipment (enter vehicle lease on ORG18) .....		
<b>b</b> Other business property.....		
<b>41</b> Repairs and maintenance .....		
<b>42</b> Supplies (not included in cost of goods sold) .....		
<b>43</b> Taxes and licenses not reported to you on Form 1098 .....		
<b>44</b> Travel, meals, and entertainment:		
<b>a</b> Travel.....		
<b>b</b> Meals and entertainment subject to 50% limit .....		
<b>c</b> Meals subject to 80% limit.....		
<b>d</b> Meals and entertainment not subject to limit.....		
<b>45</b> Utilities .....		
<b>46</b> Gross wages .....		
<b>47</b> Other expenses:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
<b>48</b> Expenses for business use of your home ( <b>Preparer Use Only</b> ).....		
Complete ORG20 for Business Use of Home.		
<b>49</b> Qualified pension plan start-up costs.....		

## Sales of Stocks and Securities

ORG21

**Attach all copies of Forms 1099-B and/or 1099-S here.**

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

- 1 Did you exchange any securities for other securities or any other property held for investment? .....
- 2 Did you acquire stock identical to stock sold at a loss within a period beginning 30 days prior to and ending 30 days after the date of the sale? .....
- 3 Did you engage in any transactions involving traded options? .....
- 4 Did you engage in any transactions involving commodity future contracts and straddle positions? .....
- 5 Did you engage in any transactions involving *employee* stock options? .....
- 6 Schedule D included in the 2012 Federal income tax return? .....

Do not include installment sales transactions here. Complete information on Installment Sales Income (ORG23) instead. See notes below for entries to be made on lines 1d, 4a, 4b and 5

### FORMS 1099-B, 1099-S – SALES OF STOCKS, BONDS, REAL ESTATE, ETC.

Transaction number.....

**1a** Check if this sale was reported to you on Form 1099-B or substitute statement .....

**b** If so, check if Box 6a is marked (i.e., this is the sale of noncovered security).....

**c** If so, check if Box 6b is marked (i.e., the basis amount was reported to the IRS).....

**d** If so, select type of gain (loss) indicated in Box 1c \*.....

**2** Description of property .....

**3a** Date acquired ..... **b** Date sold .....

**4a** Type of transaction \*\*\* ..... **b** Property ownership \*\* .....

**5** Holding period \* .....

**6** Sales price .....

**7** Cost or other basis .....

**8** Wash sale loss disallowed .....

**9** Federal Tax withheld (if any) .....

**10a** State..... **b** State identification ..... **c** State tax withheld .....

Transaction number.....

**1a** Check if this sale was reported to you on Form 1099-B or substitute statement .....

**b** If so, check if Box 6a is marked (i.e., this is the sale of noncovered security).....

**c** If so, check if Box 6b is marked (i.e., the basis amount was reported to the IRS).....

**d** If so, select type of gain (loss) indicated in Box 1c \*.....

**2** Description of property .....

**3a** Date acquired ..... **b** Date sold .....

**4a** Type of transaction \*\*\* ..... **b** Property ownership \*\* .....

**5** Holding period \* .....

**6** Sales price .....

**7** Cost or other basis .....

**8** Wash sale loss disallowed .....

**9** Federal Tax withheld (if any) .....

**10a** State..... **b** State identification ..... **c** State tax withheld .....

<p><b>* Type of Holding Period</b></p> <p>S = Short-term (one year or less)</p> <p>L = Long-term (more than one year)</p> <p><b>** Type of Ownership</b></p> <p>T = Taxpayer Ownership</p> <p>S = Spouse Ownership</p> <p>J = Joint Ownership</p>	<p><b>*** Type of Transaction</b></p> <p>S = Regular Sale of Stocks, Bonds, etc</p> <p>W = Wash Sale</p> <p>M = Collectible (28% Rate)</p> <p>P = Personal Loss on Noninvestment Property</p> <p>X = Expired (options, etc)</p>	<p>O = Worthless Securities</p> <p>K = Bankrupt</p> <p>N = Nonbusiness Bad Debt</p> <p>E = Stock sales to ESOP's or EWOC's</p>
---	---	--

# Rent and Royalty Income and Expenses

ORG25

## BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: \_\_\_\_\_

1 Check property owner .....  **Taxpayer**       **Spouse**       **Joint**

	<b>Yes</b>	<b>No</b>
2a Did you make any payments that would require you to file Form(s) 1099? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If <b>yes</b> , did you or will you file all required Forms(s) 1099? .....	<input type="checkbox"/>	<input type="checkbox"/>

3a Enter the ownership percentage (if not 100%) .....		
<b>b</b> If not 100%, are you reporting 100% of the income and expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>

4 Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) .....  **Yes**     **No**

5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? .....  **Yes**     **No**

6 For all rental properties, **enter the number of days** during 2013 that:

a The property was rented at fair rental value .....		
b The property was used personally or rented at less than fair rental value .....	_____	_____
c You owned the property, if not the entire year .....	_____	_____

7a Does this rental have multiple living units and you live in one of the units? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If <b>yes</b> , enter percentage of rental use .....	_____	_____

8 Did you actively participate in this property's management during 2013? .....  **Yes**     **No**

9 Did you materially participate in this property's management during 2013? .....  **Yes**     **No**

10 Do you want to treat this property as non-passive?.....  **Yes**     **No**

11 Did this property have unallowed passive losses in 2012? .....  **Yes**     **No**

12 Did you dispose of this property in a fully taxable transaction? .....  **Yes**     **No**

13 Check this box if some of this investment was **not** at-risk.....

14a Treat all MACRS assets for this activity as qualified Indian reservation property? .....  **Yes**     **No**

**b** Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... **Regular**  **Extension**  **No**

**c** Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....  **Yes**     **No**

**d** Was this activity located in a Qualified Disaster Area?.....  **Yes**     **No**

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2013	2012
15 Rents or royalties received .....		

- |                          |   |   |
|--------------------------|---|---|
| <b>* Property Types:</b> | <b>1</b> Single family residence<br><b>2</b> Multi-family residence<br><b>3</b> Vacation/short-term rental<br><b>4</b> Commercial | <b>5</b> Land<br><b>6</b> Royalties<br><b>7</b> Self-rental<br><b>8</b> Other |
|--------------------------|---|---|

**Rent and Royalty Income and Expenses (continued)**

**ORG25**

EXPENSES	2013	2012
Property location .....		
<b>16</b> Advertising .....		
<b>17a</b> Automobile (complete ORG18 for autos).....		
<b>b</b> Travel.....		
<b>18</b> Cleaning and maintenance .....		
<b>19</b> Commissions.....		
<b>20a</b> Mortgage insurance premiums – qualified .....		
<b>b</b> Other insurance .....		
<b>21</b> Legal and professional fees .....		
<b>22</b> Management fees .....		
<b>23a</b> Mortgage interest paid to banks – qualified.....		
<b>b</b> Mortgage interest paid to banks – other .....		
<b>24</b> Other interest .....		
<b>25</b> Repairs.....		
<b>26</b> Supplies.....		
<b>27a</b> Real estate taxes.....		
<b>b</b> Other taxes .....		
<b>28</b> Utilities .....		
<b>29</b> Other expenses:		
<b>a</b> .....		
<b>b</b> .....		
<b>c</b> .....		
<b>d</b> .....		
<b>e</b> .....		
<b>30a</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>b</b> Depletion <b>(Preparer Use Only)</b> .....		

**Tax Payments**

ORG40

**2013 ESTIMATED TAX PAYMENTS**

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1 Qtr 1 due by 04/17/13.....								
2 Qtr 2 due by 06/15/13.....								
3 Qtr 3 due by 09/17/13.....								
4 Qtr 4 due by 01/15/14 .....								
5a Additional payments ...								
b Additional payments ...								
c Additional payments ...								
d Additional payments ...								

**OTHER TAX PAYMENTS**

	Federal	State	Local
6 2012 overpayment applied to 2013 .....			
7 Balance due paid with 2012 return .....			
8a 2012 Quarter 4 payments paid in 2013 .....			
b 2012 extension payments paid in 2013 .....			
9 Other taxes paid in 2013 for prior years (include explanation) .....			

**2014 ESTIMATED TAX WORKSHEET**

If you expect any significant change in your income or expenses in 2014, please enter the increase or decrease below.

**Income**

10 Wages .....	Taxpayer .....	_____
	Spouse.....	_____
11 Self-Employment Income .....	Taxpayer .....	_____
	Spouse.....	_____
12 Capital Gains (sale of stock, real estate, etc).....		_____
13 Other Income:		
Description .....		_____

**Deductions**

14 Allowable Itemized Deductions .....	_____
15 Other deductions (such as alimony paid, early withdrawal penalties, etc):	
Description .....	_____
16 Federal Withholding.....	_____
17 Number of personal exemptions expected for 2014 .....	_____

**ADDITIONAL INFORMATION**

18 Check to use your 2013 tax amount for your 2014 estimate.....	<input type="checkbox"/>
19 If you have an overpayment of 2013 taxes, check the box to indicate how you want your overpayment applied.	
a Apply entire overpayment to next year and refund excess .....	<input type="checkbox"/>
b Apply entire overpayment to first quarter and refund excess .....	<input type="checkbox"/>
20 Amount to apply if not entire overpayment.....	_____
21 Number of installments for estimated tax (1 - 4) .....	_____

# K-1 S Corporation – Shareholder's Questions

ORG46

**Attach all copies of K-1s from S Corporations.**

<b>1</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>2</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>3</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>4</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>5</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>6</b>	Name of S Corporation ..... _____ S Corporation identification number _____ Tax shelter registration number ... _____ 1 Ownership ..... <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this S Corporation? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No

## K-1 Estate & Trust – Beneficiary's Questions

ORG47

<input checked="" type="checkbox"/>	<b>Attach all copies of K-1's from estates and trusts.</b>		
<b>1</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>2</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>3</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>4</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>5</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>6</b>	Name of estate or trust..... _____		
	Estate or trust identification no... _____		Tax shelter registration number..... _____
	1 Beneficiary .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		

# State Information Worksheet

ORG60

## GENERAL INFORMATION

	<b>Taxpayer</b>	<b>Spouse</b>
1 Enter your state of residence .....		
2 Check the appropriate box if:		
<b>Taxpayer</b>	<b>Spouse</b>	
a Full year resident.....	<input type="checkbox"/>	<input type="checkbox"/>
b Part year resident.....	<input type="checkbox"/>	<input type="checkbox"/>
c Nonresident .....	<input type="checkbox"/>	<input type="checkbox"/>
		Date of entry: _____ Date of exit: _____
3 Resident locality: _____		
4 County: _____ School district: _____ School district number: _____		
		<b>Taxpayer</b>
		<b>Spouse</b>
5 Check if disabled .....		
		<input type="checkbox"/>
		<input type="checkbox"/>

## STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## MISCELLANEOUS QUESTIONS

		<b>Yes</b>	<b>No</b>
8 Did you file a state return for 2012? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you want state forms and instructions sent to you next year? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you want any applicable penalty and interest calculated and added to the return? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 How do you want your state refund (if any) applied?			
a Refunded .....	<input type="checkbox"/>	b Apply to 2014 estimates .....	<input type="checkbox"/>
		c Apply to 2014 taxes .....	<input type="checkbox"/>
12 Additional state information: _____			
_____			
_____			