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

Personal Information:

	Yes	No
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:

	Yes	No
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:

	Yes	No
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?		

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

	Yes	No
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

ELECTRONIC FILING
(Please read – filing processes have changed)

Electronic filing is the means by which your return is transmitted directly to the IRS. Electronic filing is the only filing method that provides you with acknowledgement that the IRS has received your return and is processing it. If you are to receive a refund and use direct deposit with electronic filing, you will normally receive your refund in about 2 weeks. ***All returns eligible will be efiled for 2013.***

We will provide a copy of your return for review. **You must then sign and return Form 8879** that we will provide to you which indicates that you have reviewed your return and authorized us to electronically file the return on your behalf. ***WE CANNOT AND WILL NOT ELECTRONICALLY FILE YOUR RETURN WITHOUT THIS FORM BEING RETURNED TO US.***

There are a few other decisions to be made concerning the return(s).

Please read the following statements and select your preferences:

1. If my return results in an overpayment, I prefer: direct deposit ______
IRS check ______
Overpayment applied to 2014 tax liability ______

For direct deposit, please provide:

*Bank name ________________________________
Routing No.________________________________
Account No.________________________________

Type of account: Checking ________ Savings ________
Owner of account Taxpayer ________ Spouse ________ Joint ________

2. If my return results in a balance due, I prefer: Electronic funds withdrawal _______
Mailing a check & voucher _______

For electronic funds withdrawal, please provide:

*Bank name ________________________________
Routing No.________________________________
Account No.________________________________

Type of account: Checking _______ Savings _________
Owner of account Taxpayer _______ Spouse _________ Joint ________

**** If you prefer, you may enclose a voided check***

Date funds to be withdrawn if not April 15, 2014: ________________________

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

2013

Dependents and Wages

3A

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

Dependents

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 . . . . ______

2013

Interest Income

5A

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 from Whom Mortgage Interest Was Received	Identification Number of Individual	2013 Interest Amount	2012 Interest Amount

Address of Individual from Whom Mortgage Interest Was Received

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.

Interest Income and Foreign Information

Interest Income:

Please enclose all Forms 1099-INT or other documents for interest received
(List all items sold during the year on Form 7.)

Special Interest Code: 1 - Qualified Educational Series EE Bonds; 2 - Seller Financed Mortgage Interest; 3 - Early Withdrawal Penalty; 4 - Nominee Interest; 5 - Accrued Interest; 6 - Original Issue Discount Adjustment; 7 - Amortizable Bond Premium Adjustment

	TSJ	Source	Savings/Loans, Bank, and Other	U.S. Bonds and Obligations	Code	Special Interest
A						
B						
C						
D						
E						

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

	Social Security No. of Home Buyer	Address of Individual from Whom Mortgage Interest Was Received	Code	Tax-Exempt Interest
A				
B				
C				
D				
E				

	Federal Withholding	State Withholding	Investment Expenses	Tax Exempt Paid CUSIP No.	2012 Interest Amount
A					
B					
C					
D					
E					

Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

Additional State Information:

	Payer ID	New Hampshire Reason Interest is Nontaxable
A		
B		
C		
D		
E		

Foreign Bank Accounts and Trusts:

	Yes	No
At any time during 2013, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account or other financial account?		
If Yes, enter name of foreign country . . . . ________		
Were you the grantor of, or transferor to, a foreign trust that existed during 2013, whether or not you had any beneficial interest in it?		

Dividend Income and Foreign Information

Dividend Income:

Please enclose all Forms 1099-DIV or other documents for dividends received
(List all items sold during the year on Form 7.)

	TSJ	Source	Form 1099-DIV Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	U.S. Bond Interest Amount or Percent in Box 1a	Code	Tax-Exempt Interest
A							
B							
C							
D							
E							

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

	Form 1099-DIV Box 2a Total Capital Gain Distribution	Box 2b Unrecaptured Section 1250 Gain	Box 2c Section 1202 Gain	Box 2d Collectibles (28%) Gain	Box 3 Nontaxable Distributions	2012 Gross Dividends Amount
A						
B						
C						
D						
E						

	Form 1099-DIV Box 4 Federal Withholding	Box 5 Investment Expenses	State Withholding
A			
B			
C			
D			
E			

Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

Additional State Information:

	Payer ID	New Hampshire Reason Dividend is Nontaxable
A		
B		
C		
D		
E		

Foreign Bank Accounts and Trusts:

	Yes	No
At any time during 2013, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?		
If Yes, enter name of foreign country . . . . ______		
Were you the grantor of, or transferor to, a foreign trust that existed during 2013, whether or not you had any beneficial interest in it?		

Foreign Assets

Note: If the aggregate value of the accounts does not exceed $10,000, then you do not need to provide details.

General Information:

TSJ . . . . ____

Title of filer . . . . ____

Enter all countries where you have foreign bank accounts . . . . ____

Foreign Identification:

	Yes	No
Passport		
Foreign TIN		

If not passport or TIN, enter description . . . . ____

Number . . . . ____

Country of issue . . . . ____

Information on Foreign Financial Accounts:

1 - Bank Account 2 - Securities Account 3 - Other

	Account Type	If Other Account Type, Describe	Maximum Account Value	Account Number	Financial Institution Name
A					
B					

	Street Address	City
A		
B		

	Foreign Province/State/County	ZIP/Postal Code	Country
A			
B			

If you have no financial interest in the account or account is jointly owned, please complete the account owner information below.

Type of TIN Code: A - Employer Identification No. (EIN) B - SSN or ITIN C - Foreign

	Last Name or Organization Name	First Name	Middle Initial	Suffix	Taxpayer ID Number	
A						
B						

	# of Joint Owners	Street Address	City
A			
B			

1 - No financial interest 2A - Joint ownership - spouse is joint owner 2B - Joint ownership - other joint owner

	Foreign Province/State/County	State	ZIP/Postal Code	Country	Ownership Code	Filer's Title
A						
B						

1 - Deposit 2 - Custodial

	Type	Foreign Currency	Exchange Rate	Source of Exchange	Acct Open	Acct Closed	Joint	No Tax Items Reported
A								
B								

Asset Information:

Description	Identifying Number	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Jointly Owned	No Tax Items Reported

Value	Foreign Currency	Exchange Rate	Source of Exchange Rate

If Asset is Stock of a Foreign Entity or an Interest in a Foreign Entity

1 - Partnership 2 - Corporation 3 - Trust 4 - Estate

Name of Foreign Entity	Type of Foreign Entity	Mailing Address of Foreign Entity

City or Town of Foreign Entity	Province, County or State of Foreign Entity	Country of Foreign Entity	Postal Code of Foreign Entity

If Asset is NOT Stock of a Foreign Entity or an Interest in a Foreign Entity

1 - U.S. person
2 - Foreign person

1 - Issuer 2 - Counterparty

Name of Issuer	Issuer Code	Type of Issuer	Residence of Issuer

1 - Individual 2 - Partnership 3 - Corporation 4 - Trust 5 - Estate

Mailing Address of Issuer	City or Town of Issuer

Province, County or State of Issuer	Country of Issuer	Postal Code of Issuer

Foreign Bank Accounts and Trusts:

	Yes	No
At any time during 2013, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account or other financial account?		
If Yes, enter name of foreign country . . . . ______		
Were you the grantor of, or transferor to, a foreign trust that existed during 2013, whether or not you had any beneficial interest in it?		

Brokerage Statement Details

	TSJ	Payer Name	Account No.	Information Included (X or ✓)
A				
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
N				
O				
P				
Q				
R				
S				
T				

	Savings & Loans, Bank and Other	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	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								
O								
P								
Q								
R								
S								
T								

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

Note: For other amounts not listed, please attach a copy of your brokerage statement.

Consolidated Brokerage Statement

Brokerage Name	TSJ	Account Number

Brokerage Address

Interest Income and Foreign Information

Interest Income: (List all items sold during the year on Form 5G.)

Special Interest Code: 1 - Qualified Educational Series EE Bonds; 2 - Early Withdrawal Penalty; 3 - Nominee Interest; 4 - Accrued Interest; 5 - Original Issue Discount Adjustment; 6 - Amortizable Bond Premium Adjustment

	Source	Savings/Loans, Bank, and Other	U.S. Bonds and Obligations	Code	Special Interest
A					
B					
C					
D					
E					

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

	Code	Tax-Exempt Interest	Investment Expenses	Federal Withholding	State Withholding	Tax Exempt Bond CUSIP No.	2012 Interest Amount
A							
B							
C							
D							
E							

Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

Additional State Information:

	Payer ID	New Hampshire Reason Interest is Nontaxable
A		
B		
C		
D		
E		

2013

Consolidated Brokerage Statement Dividend Income and Foreign Information

5F

List all items sold during the year on Form 5G.

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

Dividend Income:

	Source	Form 1099-DIV Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	U.S. Bond Interest Amount or Percent in Box 1a	Code	Tax-Exempt Interest
A						
B						
C						
D						
E						

	Form 1099-DIV Box 2a Total Capital Gain Distribution	Box 2b Unrecaptured Section 1250 Gain	Box 2c Section 1202 Gain	Box 2d Collectibles (28%) Gain	Box 3 Nontaxable Distributions	2012 Gross Dividends Amount
A						
B						
C						
D						
E						

	Form 1099-DIV Box 4 Federal Withholding	Box 5 Investment Expenses	State Withholding
A			
B			
C			
D			
E			

Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

Additional State Information:

	Payer ID	New Hampshire Reason Dividend is Nontaxable
A		
B		
C		
D		
E		

Consolidated Brokerage Statement Sales of Stocks, Securities, Capital Assets and Miscellaneous Income

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		
Securities which became worthless		

	Kind of Property and Description	Gross Sales Price (Less Commissions)	Cost or Other Basis
A			
B			
C			
D			

	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Federal Tax Withheld	State Tax Withheld
A				
B				
C				
D				

Other Income:

Nature and Source	2013 Amount	2012 Amount

Other Adjustments to Income:

Nature and Source	2013 Amount	2012 Amount

Investment Interest Expense:

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

Paid To	2013 Amount	2012 Amount

Foreign Bank Accounts and Trusts:

	Yes	No
At any time during 2013, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?		
If Yes, enter name of foreign country ____________________		
Were you the grantor of, or transferor to, a foreign trust that existed during 2013, whether or not you had any beneficial interest in it?		

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

Business Expenses and Property & Equipment

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2013

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

2013

Business Expenses - Vehicle and Other Listed Property

6B

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				

2013

Business Expenses

6C

Name of Business: . . . . ______________________

Principal Business or Profession: . . . ______________________

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

If these expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . ________ %

	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		

If you are a statutory employee, 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 two or more businesses, please enter the percentage to apply to this business . . . ________ %

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		
Interest		
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

Business Use of Home

6D

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):

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

Pension, Annuity and Retirement Plan Information

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

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

Self-Employed Retirement Plan: Please enclose copies of all Forms 1099-R

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Have you established a self-employed retirement or SIMPLE plan with deductible contributions?				
Do you want to contribute the maximum amount allowed?				

Contributions to:	Taxpayer 2013 Amount	Spouse 2013 Amount
Simplified employee pension plan		
Defined benefit plan		
Defined contribution plan		
SIMPLE plan		

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

2013

Rental and Royalty
Property and Equipment & Depletion

10A

Location of Property: ______________________________

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

Acquisitions:

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

Dispositions:

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

Percentage Depletion Information:

Production Type	Royalty Income	
	2013 Amount	2012 Amount

Rental and Royalty Vehicle and Other Listed Property

Location of Property: ______________________

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				

2013

Rental and Royalty Business Expenses

10C

Location of Property: ______________________

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

If these expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . ________ %

	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		

Vehicle:

If these vehicle expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . ________ %

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		
Interest		
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

Rental - Business Use of Home

10D

Location of Property: ______________________

Partial Use of Your Home for Business:

	2013
Square footage of home used exclusively for business	
Total square footage of home	

Were improvements made to the home and/or home office since the time you began using the home for business? ☐ Yes ☐ No

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

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

Partnership and S Corporation Business Expenses

11A

2013

Activity Name: . . . . ______________________

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

If these expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . _______ %

	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		

Vehicle:

If these vehicle expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . _______ %

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		
Interest		
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

Passthrough Business Use of Home

11B

Activity Name: . . . . ______________________

Partial Use of Your Home for Business:

	2013
Square footage of home used exclusively for business	
Total square footage of home	

Were improvements made to the home and/or home office since the time you began using the home for business? . . . ☐ Yes ☐ No

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

Farm Income

Proprietor's Name: . . . . . . ______

Principal Crop or Activity: . . ______

TSJ . . . . ____

Employer identification number . . ______

Method of accounting . . . . . . ______

Farm Questions for 2013:

	Yes	No
Did you dispose of this farm?		
If Yes, what was the disposition date? (Mo/Da/Yr) ______		
Have you prepared or will you prepare all required Forms 1099?		

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

Sales of Livestock and Other Items Bought for Resale (Cash Method Only):

Description	2013		2012	
	Amount Received	Cost or Other Basis	Amount Received	Cost or Other Basis

Income (Accrual Method):

Description	Beginning Inventory	Cost of Items Purchased	Sales	Ending Inventory

Income: Please enclose copies of all Forms 1099-K

	2013 Amount	2012 Amount
Sales of livestock, produce, grains, etc. you raised		
Total cooperative distributions (Forms 1099-PATR)		
Taxable cooperative distributions		
Total agricultural program payments		
Taxable agriculture program payments		
Total Commodity Credit Corporation (CCC) loans		
Total crop insurance proceeds and certain disaster payments received in 2013		
Taxable crop insurance proceeds received		
Crop insurance proceeds deferred from prior year		
Custom hire (machine work) income		
Federal gasoline tax or fuel tax credit or refund		
State gasoline tax or fuel tax credit or refund		

Other Income:

Description	2013 Amount	2012 Amount

Farm Expenses and Property & Equipment

2013

12A

Proprietor's Name: . . . . . . ______________________

Principal Crop or Activity: . . ______________________

Expenses:

	2013 Amount	2012 Amount
Business meals and entertainment		
Car and truck expenses		
Chemicals		
Conservation expenses		
Custom hire (machine work)		
Employee benefit programs and health insurance (other than pension and profit sharing plans)		
Feed purchased		
Fertilizers and lime		
Freight and trucking		
Gasoline, fuel and oil		
Insurance (other than health)		
Interest - mortgage (paid to banks, etc.)		
Interest - other		
Labor hired		
Pension and profit-sharing plans		
Rent or lease - vehicles, machinery and equipment		
Rent or lease - other (land, animals, etc.)		
Repairs and maintenance		
Seeds and plants purchased		
Storage and warehousing		
Supplies purchased		
Taxes		
Utilities		
Veterinary, breeding and medicine		
Capitalized preproductive period expenses		
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

2013

Farm Vehicle and Other Listed Property

12B

Proprietor's Name: ______

Principal Crop or Activity: ______

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				

2013

Farm Business Expenses

12C

Proprietor's Name: . . . . . . ____________________

Principal Crop or Activity: . . ____________________

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

If these expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . ________%

	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		

Vehicle:

If these vehicle expenses are to be divided between two or more businesses, please enter the percentage to apply to this business . . . ________%

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		
Interest		
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

Farm Business Use of Home

12D

Proprietor's Name: . . . . . . ______________________

Principal Crop or Activity: . . ______________________

Partial Use of Your Home for Business:

	2013
Square footage of home used exclusively for business	
Total square footage of home	

Were improvements made to the home and/or home office since the time you began using the home for business? . . . ☐ Yes ☐ No

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

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

Miscellaneous Adjustments

Educator Expenses: **Deduction for amounts paid by educators of kindergarten through Grade 12**

TS	2013 Amount	2012 Amount

Health Savings Accounts (HSAs)

TS	Description	2013 Amount	2012 Amount
	Contributions made for 2013		
	Distributions received from all HSAs in 2013		

What type of coverage applies to your high deductible health plan? ☐ Self only ☐ Family

	Yes	No
Were any HSA contributions listed above also shown on your Form W-2?		
Were all distributions from your HSA for unreimbursed medical expenses?		
Did you or your spouse enroll in Medicare?		

If yes, what month did you enroll? ____________

What month did your spouse enroll? ____________

Other Adjustments to Income: **Please enclose all Forms 1098-E for Student Loan Interest Paid**

TSJ	Nature and Source	2013 Amount	2012 Amount

Ministerial Income

TS . . . . ____

	Yes	No
Are these deductions associated with a business?		
If Yes, enter the name of the business: ____		
Are these deductions employee business expenses?		
If Yes, enter the occupation: ____		

Parsonage:

	2013 Amount	2012 Amount
Fair rental value of parsonage provided by church		
Utility allowance of parsonage		
Actual expenses for utilities of parsonage		

Rental or Parsonage Allowance:

	2013 Amount	2012 Amount
Parsonage or rental allowance		
Utility allowance		
Actual expenses for parsonage		
Actual expenses for utilities		
Fair rental value of home, plus the cost of utilities		

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

Itemized Deductions - Mortgage Interest and Points

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?		2013 Amount	2012 Amount
		Yes	No		

Other Home Mortgage Interest Paid:

TSJ	Paid To		ID Number	2013 Amount	2012 Amount
	Name	Address			

Deductible Points:

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

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 . . . . ☐

Itemized Deduction - Business Use of Home

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

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

Employee Business Expenses-Business Use of Home

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

General Information:

TSJ . . . . ____

Employer identification number . . . . ____________

	Yes	No
Did you pay any one household employee cash wages of $1,800 or more in 2013?		
Did you withhold any federal income tax from wages paid to any household employee?		
Did you pay total cash wages of $1,000 or more in any calendar quarter of 2012 or 2013?		

Social Security, Medicare and Income Taxes:

	2013 Amount	2012 Amount
Cash wages subject to social security taxes		
Cash wages subject to Medicare taxes (if different than cash wages subject to social security)		
Cash wages subject to additional Medicare tax withholding		
Federal income tax withheld		
State disability plan payments subject to social security taxes		
State disability plan payments subject to Medicare taxes (if different than plan payments subject to social security)		

Federal Unemployment (FUTA) Tax:

	Yes	No
Did you pay unemployment contributions to more than one state?		
Were all of the wages subject to FUTA tax subject to the state's unemployment tax?		

State	Total Cash Wages Subject to FUTA	2012 Amount

Complete the following for all state unemployment contributions made:

X if payment to be made after April 15, 2014

Name of State	Total Taxable Wages	Contribution Paid to Unemployment Fund	X	2012 Amount

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 . . . .

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

TS	Name of Payer	Gross Winnings	Tax Withheld	
			Federal	State

Foreign Employment Information
(Page 1 of 3)

General Information:

TS . . . . ____

Foreign address . . . . ____

Name of employer . . . . ____

Employer's U.S. address . . . . ____

Employer's foreign address . . . . ____

Employer type: Foreign entity, U.S. company, Foreign affiliate of a U.S. company, Self . . . . ____

Enter the last year that Form 2555 was filed to claim either of the exclusions . . . . ____

Type of exclusions revoked in prior years . . . . ____

Year exclusion revoked . . . . ____

If a separate foreign residence was maintained for your family due to adverse living conditions, please provide the city, country, and number of days maintained . . . . . . ____

List tax home(s) during tax year and dates established . . . . . ____

Country of citizenry or nationality . . . . ____

Qualified housing expenses for the tax year . . . . ☐

Adjustment to employer provided amounts for qualified housing expense . . . . ☐

Tax Home History:

	Principal City and Country of Employment	Start Date (Mo/Da/Yr)	End Date (Mo/Da/Yr)
Most recent tax home			
First previous tax home			
Second previous tax home			
Third previous tax home			

Foreign Employment Information
(Page 2 of 3)

Bona Fide Residence Test Information:

Beginning date for foreign residence . . . . (Mo/Da/Yr) ____________
Ending date for foreign residence . . . . (Mo/Da/Yr) ____________
Kind of foreign living quarters:
Purchased house, Rented house or apartment, Rented room,
Quarters furnished by employer . . . . ____________
If any family members lived abroad with you during any part of the tax year, enter their names. Include the dates when the family members lived with you

Relationship	First Name	MI	Last Name	Date Arrived	Date Left	X if Entire Period

	Yes	No
Was a statement made to foreign country authorities declaring you were not a resident of their country?		
Were you required to pay income tax in that country?		
Does the foreign country have an income tax?		

State any contractual terms or other conditions relating to the length of employment abroad . . . . ____________
What type of visa was used to enter the foreign country? . . . . ____________
Explain any limitations of the visa as to length of stay or employment in a foreign country . . . . ____________
If a home was maintained in U.S. while residing abroad, show address, whether rented, names and relationships of occupants
Address
Street address . . . . ____________
City . . . . ____________
State . . . . ___
ZIP Code . . . . ____________
X if rented . . . . _

Occupants			
First Name	MI	Last Name	Relationship

Foreign Employment Information
(Page 3 of 3)

Days Present in the U.S. or Its Possessions During the Tax Year (Bona Fide Residence Test):

Date Arrived in U.S. (Mo/Da/Yr)	Date Left U.S. (Mo/Da/Yr)	Number of Days in U.S. on Business

Travel Abroad for 12 Month Period (Physical Presence Test):

Name of Country (Including U.S.)	Date Arrived (Mo/Da/Yr)	Date Left (Mo/Da/Yr)	Full Days in Country	Number of Days Present in U.S. on Business

Foreign Housing Expenses Worksheet

Indicate below (for yourself, spouse and dependents living with you) the amount of housing expenses incurred (whether paid by you or your employer) in the foreign country. If expenses are listed in foreign currency, please indicate dates of payment to the left of the amount boxes and enter type of currency.

	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses
Type of currency . . . ______________			
Rent			
Fair market value of employer-owned housing furnished to you (Without reduction for U.S. equivalent housing charge)			
Foreign real estate, occupancy taxes or television taxes (not included on Medical Expenses and Taxes form, detail by country on continuation sheet)			
Utilities (but not telephone charges)			
Real and personal property insurance			
"Key money" or other similar nonrefundable deposits paid to secure a lease			
Repairs and maintenance			
Furniture rental			
Lodging portion of temporary living expenses (Do not include on Moving Expenses page)			

Other Expenses:

Description	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses

Total expenses			

Indicate if meals and/or lodging were provided by or on behalf of your employer on his business premises:
(If you resided in a camp, you are considered to be on the business premises of your employer.)

	Yes	No
To you		
To your family members		

Foreign Travel and Workdays Information Worksheet 30D

Complete for every month even if this may have been your first or last year in the U.S.

Travel To/From the U.S.				Days in Month		Days Worked In and Outside U.S.			
Dates (Mo/Da/Yr)		Dates (Mo/Da/Yr)				Days Not Worked*		Days Worked**	
Left Foreign Country	Arrived U.S.	Left U.S.	Arrived Foreign Country			U.S.	Foreign	U.S.	Foreign
				January	31				
				February	28				
				March	31				
				April	30				
				May	31				
				June	30				
				July	31				
				August	31				
				September	30				
				October	31				
				November	30				
				December	31				
				Total	365				

* Weekends, holidays, vacation, sick, etc.
** Include weekends and holidays if you worked on these days.

During 2013, in which state(s)/city(ies) did you work? **Please list the dates**

State/City	From (Mo/Da/Yr)	To (Mo/Da/Yr)	Days Worked

Total (must agree with U.S. days worked shown above) ____

Days in U.S. for any reason in . . . . 2012 ____ 2011 ____

Foreign Wages and Other Income
(Page 1 of 2)

Foreign Questions for 2013:

	Yes	No
If you will be outside the U.S., do you want an automatic extension if you qualify?		
Will any tax due be paid with the extension?		
If you were working outside the U.S., did you terminate your foreign employment in 2013?		
Did you have foreign income derived from sources within designated "Boycott Activities"? If Yes, please provide all information pertaining to the boycott activities.		

Foreign Source Wages and Salaries:

Please enclose all copies of your current year Forms W-2 or other wage statements

TS ____

Employer name . . . . ____________

Employer address . . . . ____________

Employer city . . . . ____________

Employer state . . . . ___

Employer ZIP . . . . ________

Employer foreign country . . . . ____________

	2013 Amount	2012 Amount
Base wages		
Federal tax withheld		
FICA withheld		
Medicare tax withheld		

Days in foreign country before foreign assignment . . . . ______

Days in foreign country after foreign assignment . . . . ______

Days in U.S. while on foreign assignment . . . . ______

Allowances and Reimbursements:

	2013 Amount	2012 Amount
Cost of living and overseas differential		
Moving expense reimbursement		
Family		
Education		
Home leave		
Quarters		
Bonus		
Stock option - current year		
Foreign tax reimbursement		
Survivor's insurance		
Automobile		
Hardship premium		
Home gross salary		
Tax adjustment - current year		
Gross up		
Mobility premium		
Relocation allocation		
Wire transfer allowance		
Home housing allowance		
Home gross entitlement		
Home net entitlement		
Variable pay awards		
Miscellaneous		
Imputed tax preparation fees		
Home country pension cost		
401(k) reductions		

Foreign Wages and Other Income
(Page 2 of 2)

Allowances and Reimbursements (Continued):

Other Allowances and Reimbursements:

Description	2013 Amount	2012 Amount

State and Local Information:

State	Employer's State I.D. No.	State Wages, Tips	State Income Tax	Local Wages, Tips	Local Income Tax	City	Locality Name

Other Income and Noncash Income:

TSJ	Nature and Source	2013 Amount	2012 Amount

Other Adjustments:

TSJ	Nature and Source	2013 Amount	2012 Amount

Miscellaneous Income:

	TSJ _____		TSJ _____	
	2013 Amount	2012 Amount	2013 Amount	2012 Amount
Unemployment compensation received				
Unemployment compensation repaid in 2013				
Social security benefits received				
Social security benefits repaid in 2013				

Enter Any Additional Information:

Foreign Wages and Other Income Worksheet

You may skip this page if company statements for this information are provided.

NOTE: If you received income in 2013 for services performed in prior years, (bonus, separation payments, etc.) provide us with a copy of your tax return for these years unless we have them in our possession. If expenses are listed in foreign currency, please indicate dates of payment and type of currency to the left of the amount boxes.

Compensation: **You must provide the originals of Form W-2**

Employer:	Taxpayer	Spouse
Gross base salary		
Tax deferred savings (401K)		
Bonus - 2013		
Bonus - other years Indicate year(s) ____________		
Cost of living allowance		
Education		
Dependent travel		
Housing		
Group life insurance		
Tax equalization		
Foreign taxes reimbursed - 2013		
- 2012 and prior years		
Moving		

Other Allowances - Description	Taxpayer	Spouse

Non-cash Remuneration:	Taxpayer	Spouse
Home (lodging)		
Meals		
Car		

For additional employers, please provide details on a continuation sheet.

Foreign Taxes

Country of residence: ______________________________

Foreign Taxes Paid or Accrued:

TS	Country Name	Income Type (Dividends, Rents, Etc.)	Is Tax Accrued?	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (In Foreign Currency)	Tax Amount (In U.S. Dollars)

Prior Year Foreign Taxes Paid in the Current Year:

Year	Date Paid (Mo/Da/Yr)	Amount

Enter Any Additional Foreign Tax Information:

2013

Gifts Made Outright to an Individual

NOTE: Only complete Forms 34 and/or 35 if in 2013:

- **You made gifts of cash or marketable securities to an individual that exceeded $14,000; or**
- **You made gifts of hard-to-value assets (such as closely-held stock) to an individual of any amount; or**
- **You made any transfers to a trust (including paying premiums on a life insurance policy that was transferred to a life insurance trust).**

You should include all gifts made to each individual during the year, including gifts for his or her birthday, holiday, anniversary, graduation, etc. In addition, please include any gifts you made for educational or medical expenses. You can exclude amounts paid directly to a qualifying educational organization for tuition. You can also exclude amounts paid directly to health care providers if the expenses relate to nonelective medical expenses.

If you made any loans with an interest rate below the market rate of interest, please provide details below.

If your most recent gift tax return was not prepared by us, please include a copy.

For gifts other than cash, please include a copy of any appraisal(s) of assets.
If no appraisal is available, please describe how the value was determined.

For each gift made outright to an individual during the year, please provide the following information:

Gift 1:

Person giving the gift . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Name of person receiving the gift . . . . ______________________

Address of person . . . . ______________________

Your relationship to the person
(e.g., son, granddaughter or friend) . . . . ______________________

Age of the person . . . . ____

Date(s) of gift(s) . . . . (Mo/Da/Yr) ____________

Description and amount of assets gifted
(e.g., $14,000 in cash or 500 shares of ABC stock) . . . . . ______________________

Cost basis of assets gifted if other than cash . . . . ☐

Value of assets gifted if other than cash . . . . ☐

Gift 2:

Person giving the gift . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Name of person receiving the gift . . . . ______________________

Address of person . . . . ______________________

Your relationship to the person
(e.g., son, granddaughter or friend) . . . . ______________________

Age of the person . . . . ____

Date(s) of gift(s) . . . . (Mo/Da/Yr) ____________

Description and amount of assets gifted
(e.g., $14,000 in cash or 500 shares of ABC stock) . . . . . ______________________

Cost basis of assets gifted if other than cash . . . . ☐

Value of assets gifted if other than cash . . . . ☐

Gifts Made in Trust

NOTE: Complete this form only if you have made gifts in or to a trust during the year.

For each gift made in trust during the year, please provide the following information:

Name of trust receiving the gift . . . . ______

Name of the trustee . . . . ______

Address of the trustee . . . . ______

Trust identification number . . . . ______

Name of the beneficiary of the trust . . . . ______

Your relationship to the beneficiary
(e.g., son, granddaughter or friend) . . . . ______

Age of the beneficiary . . . . ______

Date(s) of gift(s) . . . . (Mo/Da/Yr) ______

Description and amount of assets gifted
(e.g., $14,000 in cash or 500 shares of ABC stock) . . . . . ______

Cost basis of assets gifted if other than cash . . . . ______

Value of assets gifted if other than cash . . . . ______

For gifts other than cash, please include a copy of any appraisal(s) of assets. If no appraisal is available, please describe how the value was determined.

______

Please include a copy of the following:

A copy of the trust document(s) unless previously furnished to us.

A copy of the letter(s) notifying the beneficiary of his or her right to withdraw, if the trust grants the beneficiary the right to withdraw amounts contributed to the trust.