

# ARMAO LLP

CERTIFIED PUBLIC ACCOUNTANTS

## TAX PREPARATION WORKSHEET

<b>GENERAL INFORMATION</b>	
<b>PROVIDE ALL COPIES OF CURRENT YEAR FORMS AND DOCUMENTS LISTED BELOW</b>	
✓	Forms W-2
✓	Forms 1099-INT or other documents for interest received
✓	Forms 1099-DIV or other documents for dividends received
✓	Forms 1099-A, 1099-B, 1099-S and copies of investment statements for the year
✓	Forms 1099-R indicating retirement plan distribution during the year
✓	Schedules K-1 for ownership interest in Partnership, S Corporation, Estate or Trust
✓	Forms W-2G, 1099-MISC, 1099-SSA, 1099-G, 1098 or other income tax related documents

<b>PERSONAL INFORMATION</b>	<b>YES</b>	<b>NO</b>
Did your marital status change during 2013?	<input type="checkbox"/>	<input type="checkbox"/>
Are you legally married?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, do you and your spouse want to file separate returns?	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change during 2013?	<input type="checkbox"/>	<input type="checkbox"/>
Can you or your spouse be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>

**FOR ANY QUESTIONS ANSWERED “YES “IN THE CATEGORIES THAT FOLLOW,  
PLEASE ATTACH SUPPORTING DETAIL OR DOCUMENTS.**

<b>DEPENDENTS</b>	<b>YES</b>	<b>NO</b>
Did you have any dependents during 2013? Note: Include first and last name, social security number, date of birth and relationship of each dependent	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked or looked for work?	<input type="checkbox"/>	<input type="checkbox"/>

<b>PURCHASES, SALES AND DEBT</b>	<b>YES</b>	<b>NO</b>
Did you start a new business, purchase a new rental property or acquire any new interest in any partnership or S corporation during 2013?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange or purchase any real estate in 2013? If so, please attach closing statements.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest in 2013?	<input type="checkbox"/>	<input type="checkbox"/>

<b>ADDITIONAL QUESTIONS ON REVERSE</b>
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**TAX PREPARATION WORKSHEET - CONTINUED**

<b>ITEMIZED DEDUCTIONS</b>	<b>YES</b>	<b>NO</b>
Did you make any cash or non-cash contributions to any charitable organizations?		
Did you incur significant out-of-pocket medical expenses during 2013?		

<b>MISCELLANEOUS</b>	<b>YES</b>	<b>NO</b>
Did you or your spouse have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA) during 2013? If you received a distribution from an HSA or MSA, please include Form 1099-SA.		
Did you or your dependents incur any post-secondary education expenses, such as tuition?		
Did you or your spouse own any foreign financial assets?		
Did you have any foreign income or pay any foreign taxes during 2013?		
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?		
Did you make gifts of more than \$14,000 to any individual?		
Did you incur any unreimbursed business or job-related expenses during 2013?		
Did you retire or change jobs in 2013?		
Did you make any contributions to an IRA during 2013?		

<b>OTHER</b>	<b>YES</b>	<b>NO</b>
Did you receive any correspondence from the IRS or other taxing jurisdictions during 2013?		
Did you or your spouse make estimated income tax payments (Federal or State) during 2013?		
Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2013?		