

2013

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2013,
Please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes No

- ☐ ☐ Did your marital status change during the year?
- ☐ ☐ Did your address change during the year?
- ☐ ☐ Could you be claimed as a dependent on another person's tax return for 2013?

DEPENDENTS

- ☐ ☐ Were there any changes in the number or status of dependents this year?
- ☐ ☐ Could your dependent be claimed as a dependent on another person's return?
- ☐ ☐ Were there any individuals living with you that you are not claiming as a dependent? (If yes, please explain)
-
- ☐ ☐ Did you provide over half the support for any other person other than your dependent ? (If yes, please explain)
-
- ☐ ☐ Do you have any dependents that are disabled? (If yes, please provide names)
-
- ☐ ☐ Did you pay any expenses related to the adoption of a child during this year?
- ☐ ☐ Were any of your unmarried children who might be claimed as dependents, 19 years of age or older at the end of 2013?
- ☐ ☐ Did you have any children under age 19 or full-time students under age 24 at the end of 2013, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?
- ☐ ☐ Did you pay for child care or dependent care expenses, so that you and/or your spouse could work or continue your education?
- ☐ ☐ Did you pay into and/or receive pretax dependent care benefits through your employer?
- ☐ ☐ Did you have a stillborn child this year?
- ☐ ☐ Did you provide a home for a parent, parents, or ancestral parent(s) that required assistance with activities of daily living?

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

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|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay more than \$800 in residential care, assisted living or other medical costs for any Arizona resident aged 65 years old or more? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you adopt a child this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest on behalf of a dependent or yourself? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you not claim a dependent on your federal return, in order to allow your dependent to claim the federal education credit? |

INCOME

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any social security, unemployment, disability, gambling, jury duty, prizes or unreported tip income during this year? (Circle all that apply) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a settlement from a lawsuit during this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive or pay any alimony? (Which _____ In what amount \$ _____) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income from a property sold prior to this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any Arizona Lottery winnings in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive compensation as a result of Active US Armed Services, National Guard or Reservist Service? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income or buy or sell property in any state other than Arizona? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone in your family receive a scholarship of any kind this year? (If YES, please provide the details.) |

PURCHASES, SALES AND DEBT

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

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|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 day of 2014? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you exercise any stock options this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or sell any bonds you paid more or less than the face value? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2013? |

If assets have been sold, please provide information, so that we may determine the cost basis and date of purchase of the assets.

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? If so, please provide a copy of the closing documents. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay sales tax on the purchase of one or more new mobile homes, motor vehicles, or recreational vehicles? If so, please provide a copy of the bill(s) of sale. If the vehicle qualifies for a tax credit, please advise. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? If so, please include related documents and any Forms 1099-C or 1099-A. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone owe you money which had become uncollectible? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you own any rental properties (commercial or residential), have you filed the required sales tax reports and required 1099s? |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a profit-sharing, retirement plan or individual retirement arrangement (including Traditional, 401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If yes, please provide Form(s) 1099-R. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, ROTH etc.)? In what amount? _____
Date(s): _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | If it will benefit you, would you want to contribute to an IRA, SEP or SIMPLE IRA or to a ROTH IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or roll over any amount from one retirement plan to another retirement plan? |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

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|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a retirement distribution from a U.S. Government , Arizona State or Local Government Pension? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan that you subsequently rolled over into another retirement plan within 60 days of receiving the distribution? If so, we will need the related documentation of the withdrawal and rollover. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you take qualified reservist distributions due to the financial demands caused by being called to Active Military Service? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you take retirement distributions to pay medical expenses or to pay health insurance, as a result of being unemployed, or due to disability? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions from an estate? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions due to total and permanent disability? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions after separation from your employer, after reaching age 55 or from a qualified government defined benefit plan after reaching age 50? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions as part of a qualified domestic relations order or distributions of dividends from an employee stock ownership plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions as part of a series of substantially equal payments? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions as a result of an IRS levy? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive retirement distributions to purchase your first home? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you take retirement distributions to pay for qualified higher education expenses for you, your spouse, a child or a grandchild? |
| <input type="checkbox"/> | <input type="checkbox"/> | Will you or have you attained age 70 ½ in 2014? If so, please provide the value of all of your IRA accounts as of 12/31/2013. \$ _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Will your spouse or has your spouse attained age 70 ½ in 2014? If so, please provide the value of all of your spouses IRA accounts as of 12/31/2013. \$ _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | If you are self-employed, do you maintain a Money Purchase or Profit Sharing Plan? If so, please provide a copy of the 12/31/2013 investment account statement for your plan. |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

EDUCATION

- ☐ ☐ Did you receive a distribution from an Education Savings Account, 529 plan or a Qualified Tuition Program?
- ☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, please provide all tax related forms. Which year of studies (freshman, sophomore, junior or senior) was the student considered in 2013?
- ☐ ☐ Did you incur any unreimbursed expenses working as a teacher, counselor, or principal for classes, kindergarten through grade 12? If so, in what amount?

- ☐ ☐ Did you contribute to any Section 529 plan during 2013? **The Arizona deductible contribute limits are up to \$2,000 (Single or HOH) or \$4,000 (married filing jointly)** If so, in what amount(s)? _____ Date(s)

ITEMIZED DEDUCTIONS

- ☐ ☐ Did you incur a loss because of damage or stolen property?
- ☐ ☐ Did you work out of town for part of the year?
- ☐ ☐ Did you use your car on the job (other than to and from work)?
- ☐ ☐ Is your family covered by a health insurance plan through your employer? If NO, provide amounts paid for each NON-covered individual on this organizer)
- ☐ ☐ If, YES, is your share of the premiums deducted PRE-TAX from your paycheck?
- ☐ ☐ Did you pay any deductible investment interest in 2013? This would be interest on a loan where you used the proceeds to purchase an investment; or interest on a loan that is secured by investment property, such as a margin loan from a securities brokerage firm
- ☐ ☐ Did you pay any property taxes on any real property? If yes, please provide information.
- ☐ ☐ Is your primary mortgage balance in excess of \$1,000,000 or a home equity loans in excess of \$100,000?
- ☐ ☐ Do you have evidence to substantiate your charitable contributions? If NO, then a deduction is NOT allowed. For your non-cash charitable donation, an itemized list is require
- ☐ ☐ Did you have any unreimbursed, out of pocket expenses, employment expenses?

2013	1040	US	Miscellaneous Questions
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Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an expense account or allowance with your employer?. If YES, and you are claiming your expenses, list the totals of each category and any reimbursements received on the organizer. |
| <input type="checkbox"/> | <input type="checkbox"/> | If YES, and you are NOT claiming your expenses, were your reimbursements received greater than your expenses? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay out of pocket medical, dental, or prescription drug expenses not covered by health insurance or a flexible spending account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any transportation (including mileage) or lodging expense to obtain medical care? (If YES, please indicate on the organizer) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any other medical expense (hearing aids/batteries, eyeglasses, contact/supplies, medical devices/supplies/equipment, etc? (If YES, please indicate on the organizer) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any personal property taxes (i.e. registration based on value, etc)? (If YES, please indicate on the organizer) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any COBRA health care coverage continuation premiums? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any expenses related to seeking a new job, in the same field of work? |

ESTIMATED TAXES

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you apply an overpayment of 2012 taxes to your 2013 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2013 taxes, do you want the excess applied to your 2014 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your 2014 taxable income and withholdings to be different from 2013? If so, please describe any anticipated changes. |

CREDITS

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a State Qualified Charitable Organization that provides Assistance to the Working Poor ? If so, please provide a copy of the receipt. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a State Foster Care Qualified Charitable Organization that provides Assistance with foster care ? If so, please provide a copy of the receipt. |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you make a contribution to a Public or Charter School for the support of Extracurricular Activities for Arizona tax credit of \$200 (single) or \$400 (married filing joint) ? If yes, how much did you contribute? \$ _____?</p> <p>Please provide a copy of the receipt.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you make a contribution to a Private School Tuition Organization that provides Scholarships and/or Grants to Qualified Schools for the Arizona Tax Credit of up to \$517 (Single or HOH) or \$1,034 (married filing jointly) ? If yes, how much did you contribute? _____. Please provide a copy of your receipt.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you make a contribution to a Certified School Tuition Organization that provides Scholarships and/or Grants to Qualified Schools for the Arizona Tax Credit of up to \$514 (Single or HOH) or \$1,028 (married filing jointly) ? If yes, how much did you contribute? _____. Please provide a copy of your receipt.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you invest in a Limited/General Partnership that provides Tax Credits or substantial first year tax deductions?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you purchase and place in service, a qualified fuel cell vehicle?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you place in service, a qualified alternative fuel vehicle refueling property?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you receive tax credit bonds in which the holder receives a tax credit in lieu of some or all of the interest on the bond?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you receive a low income Mortgage Interest Credit?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you place in service for business or personal purposes, a qualified plug-in electric drive motor vehicle or a qualified two or three-wheeled plug-in electric vehicle?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you make energy saving improvements to your home located in the United States?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did your mutual fund or REIT pay taxes on your behalf for undistributed capital gains?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Are you eligible for the Health Coverage Tax Credit?</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you have a net increase for 2013 in full-time employment within a military reuse zone? If unsure, mark YES.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you incur expenses in constructing a qualified enviromental technology manufacturing facility?</p> |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for increased research activities for research conducted in Arizona? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company install solar energy devices for personal, commercial or industrial use? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you are involved in commercial agriculture, did you incur expenses to purchase tangible personal property that is primarily used in your trade or business, to control or prevent pollution? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company donate real property or improvements to an Arizona school district or Arizona charter school, for use as a school or as a site for the construction of a school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a net increase for 2013 in qualified employment positions in a healthy forest enterprise, net training and certified costs? If unsure, mark YES |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a credit for purchase and installation of an agricultural water conservation system for your residence located in Arizona? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company install a solar hot water plumbing stub-out or electric vehicle recharging outlet in a house or dwelling unit you constructed? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you employ a Temporary Assistance for Needy Families (TANF) recipient? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company provide a qualified health insurance plan or make contributions to a Health Savings Account (HSA) for your employees, who are Arizona residents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you employ a member of the Arizona National Guard that was placed on Active Duty in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you own a company that produced motion pictures, commercials, or other productions in Arizona? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make an investment in a Qualified Small Business in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any unused enterprise zone credits remaining in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any unused environmental technology facility credits remaining in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any unused military reuse zone credits remaining in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any unused recycling equipment credits remaining in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any unused increased research activities credits remaining in 2013? |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

☐ ☐ Do you think you qualify for any other Federal or State Tax credit that is not listed here or discussed elsewhere in your Tax Organizer? Please provide details. _____

BUSINESS OWNERS (Schedule C, E)

☐ ☐ Have you included in your gross receipts/sales on the organizer, all income reported to you on Forms 1099-Misc or 1099-K?

☐ ☐ Did you make any business related payments of \$600 or more, during the year, for services, rents, or interest that you were required to file Form 1099? (If Yes, were they filed _____?)

☐ ☐ Have you included in your expenses on the organizer, all expenses you have reported to others on your Forms 1099 (for services, rents, and interest)?

☐ ☐ Did you refinance any business loans? (If YES, please provide the closing statement.

☐ ☐ If you collect sales taxes, is it included in your gross receipts/sales/rents on the organizer? (If YES, please indicate in that area that sales taxes are included)

☐ ☐ Have you added or disposed of any fixed assets used in your trade or business, rental or farm activity? (If YES, please provide the details or the additions or disposals)

☐ ☐ Did you lease a vehicle which you used in your trade or business? (If YES, please provide the details)

☐ ☐ Did you have any personal consumption of your business products, supplies, or inventory? (If YES, please provide the total value of all items consumed to be claimed as additional income or a reduction of expenses on the organizer)

☐ ☐ Have you reduced any business expenses by the personal use portion (i.e. utilities, phone, auto, real estate taxes, etc)? (If YES, please explain)

☐ ☐ Do you have written documentation (mileage log) to support your vehicle mileage deduction? (If NO, a deduction is NOT allowed)

☐ ☐ Did you do any bartering during the year? (If YES, please explain)

☐ ☐ Did you pay health insurance premiums for your employees this year?

☐ ☐ Did you use an area of your home regularly and exclusively for business purposes?

2013	1040	US	Miscellaneous Questions
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Yes No

☐ ☐ Did you have any business rents, interest or management fees paid to a related party (parent, grandparent, child, grandchild, brother, sister, corporation or partnership)? (If YES, provide the amount and type of expenses for each person, including their SSN or EIN and the relationship to you.)

MISCELLANEOUS

☐ ☐ Do you want to allocate \$3 to the Presidential Election Campaign Fund?

☐ ☐ Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

☐ ☐ If you have an Arizona State refund, do you wish to make a voluntary gift to any of the state voluntary gift programs? If so, how much \$_____ and to which program _____? **Understand this will reduce your refund and you will not be able to reduce the gift on a later amended return**

☐ ☐ Did you pay any premiums for Long-Term Care Insurance?

☐ ☐ Did you contribute to a Long-Term Care Savings Account established under Arizona Law?

☐ ☐ Did you make or were you the recipient of any "below-market" or "interest-free" loans this year?

☐ ☐ Does your principle residence (and second residence, if any) have loan(s) that exceed the fair market value of the residence?

☐ ☐ Did you make any out-of-state purchases (by telephone, internet, mail, in person) that you did NOT pay state sales or use taxes on? (If YES, provide details on the organizer)

☐ ☐ Are you paying interest on a loan for a boat or recreational vehicle that has basic living accommodations, such as sleeping, restroom and cooking facilities?

☐ ☐ Were you the victim of a Ponzi-type investment scheme?

☐ ☐ Are you in the business of farming or processing agricultural crops and did you provide qualified crop gifts to one or more charitable organizations located in Arizona?

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, foreign annuity or other financial account?

2013	1040	US	Miscellaneous Questions
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Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | Do you own shares of stock in a foreign corporation, or own property in a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of or transferor to a foreign trust or did you have an interest in any foreign assets or accounts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you considered totally or partially blind? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new home after Jan 1st, 2009, close before Sept 30th, 2010, take the First Time Home Buyers Credit and then sell the home within 3 years? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a medical savings account (MSA), a Medicare + Choice MSA or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of an account holder? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you registered as an Arizona sole proprietorship with the Arizona Department of Health Services to operate a nonprofit medical marijuana dispensary? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses due to a change of employment? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay Primary Mortgage Insurance Premiums (PMI) on a mortgage taken out after 12/31/2006? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees to whom you paid more than \$1,800 in 2013? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make contributions to a Health Savings Account (HSA) this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have distributions from a Health Savings Account (HSA) this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you sold an asset for which Bonus Depreciation or the IRS Section 179 deduction was not allowed on the state return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you withdraw from your Arizona County, City or School Retirement System contributions early? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a federal or state pension? If so, please provide the Form 1099-R |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay medical expenses for someone you could not claim as a dependent? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a casualty loss (sudden, unexpected and unusual in nature)? |

2013	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes	No	
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| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a theft loss (including larceny, robbery and embezzlement)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any investor expenses to produce, collect, conserve, manage or maintain income-producing property or investments? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance a home loan, for which the points from the prior loan, have not been completely amortized? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? If so, please provide a copy of the notice or report |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to any one individual that totaled more than \$14,000, or any gifts to a trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you inherit or purchase any property in 2013? If yes, please provide details. |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a trust as part of your overall estate and transfer planning? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you think you qualify for any other Federal or State Tax expense deduction or credit, that is not listed here or discussed elsewhere in your Tax Organizer? Please provide details. |

To the very best of my/our knowledge, the provided information is complete, correct, includes all income, deductions and other information necessary for the preparation of this year's income tax returns for which I/we have adequate records.

Taxpayer's Signature _____ Date _____ Spouse's
Signature _____ Date _____