GURIN & GURIN

2013 TAXPAYER'S CHECKLIST

If mailing in or dropping off tax returns, complete the worksheet.
Please provide documents to substantiate all items of income, deductions and/or credits.

****** ATTN: NEW CLIENTS *****
PLEASE PROVIDE A COPY OF YOUR PRIOR YEAR'S FEDERAL, STATE & LOCAL INCOME TAX RETURNS

TP: ____________________ SP: ____________________

DOB: ___/___/___ DOD: ___/___/___ DOB: ___/___/___ DOD: ___/___/___

SSN: ___-___-___ SSN: ___-___-___

Occupation: ____________________ Occupation: ____________________

Street Address: ____________________ Suite/Apt #: ____________________

City: ____________________ State: __________ Zip: __________

Email: ____________________ Email: ____________________

(Check all that apply)
❑ Blind ❑ Deaf ❑ Hemiplegic
❑ Paraplegic ❑ Quadraplegic
❑ Total & Permanently Disabled

(Check all that apply)
❑ Blind ❑ Deaf ❑ Hemiplegic
❑ Paraplegic ❑ Quadraplegic
❑ Total & Permanently Disabled

Filing Status (check only one): ❑ Single ❑ Married Filing Joint ❑ Surviving Widow(er) w/ Dependent Child
❑ Head of Household ❑ Married Filing Separate → Spouse's Name: ____________________
Spouse's SSN: ___-___-___

During 2012, were you: ❑ Married Date: ___/___/___ ❑ Divorced/Legally Separated Date: ___/___/___
*(Include copy of **ENTIRE** divorce decree or separation agreement)*

Child(ren) living w/ you and 18 & under OR between ages 19-23 AND a FULL-TIME student at least FIVE months during the taxable year.

	NAME	DOB	SSN	RELATIONSHIP	# MO. IN HOME	YR of COLLEGE
1.		/ /	- -			
2.		/ /	- -			
3.		/ /	- -			
4.		/ /	- -			
5.		/ /	- -			

a. Are any of the dependent(s) blind, deaf and/or disabled? If so, who? ____________________

b. Could any dependent(s) listed above be the qualifying dependent/relative of another taxpayer? If so, who? ____________________

c. Did any of the dependent(s) earn more than $3,900 during 2013? If so, who? ____________________

d. Do you have reason to believe your qualifying dependent has already filed a return & claimed an exemption for himself/herself? ❑ Yes ❑ No

e. Are you claiming any of the dependent(s) above in accordance with a divorce decree or separation agreement? ❑ Yes ***(include documents)*** ❑ No

2013 INCOME

WAGES (include W-2)

	Name of Company	Tp / Sp
1.		
2.		
3.		
4.		
5.		

MISC INCOME (include 1099-MISC)

	Name of Company	Tp / Sp
1.		
2.		
3.		
4.		
5.		

INTEREST (include 1099-INT)

	Payer	Amt
1.		$
2.		$
3.		$
4.		$
5.		$

DIVIDENDS (include 1099-DIV)

	Payer	Ord	Qual	CGD
1.		$	$	$
2.		$	$	$
3.		$	$	$
4.		$	$	$
5.		$	$	$

PENSION/ANNUITY (include 1099-R)

	Payer	Amt	Tp / Sp
1.		$	
2.		$	
3.		$	
4.		$	
5.		$	

IRA (include 1099-R)

	Payer	Amt	Tp / Sp
1.		$	
2.		$	
3.		$	
4.		$	
5.		$	

SALE OF STOCK (include 1099-B)

SHORT-TERM GAIN(S)/LOSS(ES)

	Security	Proceeds	Cost
1.		$	$
2.		$	$
3.		$	$
4.		$	$
5.		$	$

LONG-TERM GAIN(S)/LOSS(ES)

	Security	Proceeds	Cost
1.		$	$
2.		$	$
3.		$	$
4.		$	$
5.		$	$

SOCIAL SECURITY: TAXPAYER (include SSA-1099)

Box 3 (Benefits Paid in 2013):	$	
Box 4 (Benefits Repaid in 2013):	$	
Box 6 (Voluntary Federal W/H):	$	
Medicare Premiums Paid:	**SEE P3, MEDICAL EXP**	TYPE: A B C D
Medicare Premiums Paid:	**SEE P3, MEDICAL EXP**	TYPE: A B C D

SOCIAL SECURITY: SPOUSE (include SSA-1099)

Box 3 (Benefits Paid in 2013):	$	
Box 4 (Benefits Repaid in 2013):	$	
Box 6 (Voluntary Federal W/H):	$	
Medicare Premiums Paid:	**SEE P3, MEDICAL EXP**	TYPE: A B C D
Medicare Premiums Paid:	**SEE P3, MEDICAL EXP**	TYPE: A B C D

HSA DISTRIBUTION (include 1099-SA)

Trustee:

Gross Distribution: $ Amt Used for Medical Exp: $

Trustee:

Gross Distribution: $ Amt Used for Medical Exp: $

INSTALLMENT SALE (attach addt'l sheet if needed)

Name: SSN:

Address:

City: ST: Zip:

Interest Paid: $ Principal Paid: $

NONTAXABLE INCOME

Veterans Pension/Disability:	$	Cancelled Debt:	$
Worker's Comp or SDI:	$	Other:	$
Child Support:	$	Other:	$
Gain on Sale of Residence:	$	Other:	$
Gifts over $300:	$	Other:	$

OTHER INCOME (include supporting documents)

	TP	SP
State Income Tax Refund	$	$
Unemployment Compensation	$	$
- Federal Withholding	$	$
- State Withholding	$	$
Alimony		
- Received	$	$
- Paid (Need Recipient's SSN)	$	$
Jury Duty	$	$
Election Board Fees	$	$
Prizes/Lottery/Gambling		
- Winning(s)	$	$
- Loss(es)	$	$
Bartering	$	$
Farm Income	$	$

2013 DEDUCTIONS

MEDICAL

Do not include any amounts paid for/reimbursed by medical insurance or any other type of insurance or amounts paid using funds from a Health Savings or Flexible Spending Account.

Do not include health insurance premiums paid w/ pre-tax income (i.e. payroll deductions)

Prescription Medicine & Drugs			$
Office Visits			$
Co-pays			$
Doctors/Specialists			$
Hospital/Ambulance			$
Lab Tests/Therapy/X-Rays			$
Dental/Orthodontics			$
Hearing Aid/Glasses/Eye Exams			$
Medical Miles Driven ($0.24 per mile)			#
Medical/Dental/Vision Insurance	TP $		SP $
Long-Term Care Insurance	TP $		SP $
Medicare Insurance	TP $		SP $

INTEREST

Qualified Mortgage Interest:	
- 1st Home	$
- 2nd Home	$
Qualified Home Equity Loan	$
Land Contract Interest Paid	$

To Whom Paid:

Name ______________________ SSN ______ - ____ - ______

Address ______________________________________

City ______________________ ST ________ ZIP __________

Boat/Motor Home Interest*	$
Points Paid on New Home Purchase	$
Points Paid on Refinance of Current Home	$
Term of Refinanced Loan	Yrs
Qualified Mortgage Insurance Premiums (Form 1098, Box 4)	$
Investment Interest Paid	$

****Must have eating, sleeping & toilet facilities***

MISCELLANEOUS

Unreimbursed Employee Expenses (Required for Work):

Cell Phone	$	Tax Preparation Fees	$
Continuing Education	$	Travel	$
Hotels/Lodging	$	Uniforms/Boots	$
Job Search	$	Union Dues	$
License Renewal	$	Mileage	
Meals & Entertainment	$	Total	#
Safe Deposit Box	$	Commuting	#
Small Tools	$	Business	#
Supplies	$		

IRA Fees (only if billed separately & paid - NOT paid w/ IRA funds) $

ADJUSTMENTS TO AGI

Health Savings Acct Contribution		$
Moving Expenses		$
Penalty on Eearly W/D of Savings		$
Student Loan Interest Paid		$
Traditional IRA Contribution	TP $	SP $
Roth IRA Contribution	TP $	SP $

CHARITABLE CONTRIBUTIONS

******To be deductible, must have acknolwedgement from qualified organization******

Cash/Check	$
Other than Cash/Check	$

If over $500, please provide the following (attached addt'l sheets if necessary)

ITEM(S)	DATE DONATED	COST	FMV
1.	/ /	$	$
2.	/ /	$	$
3.	/ /	$	$
4.	/ /	$	$

Charitable Miles Driven ($0.13 per mile)		#	
Automobile	/ /	$	$
Boat	/ /	$	$
Aircraft	/ /	$	$

TAXES

State Income Tax PAID in 2012 for Prior Year's Tax	$
Local Income Tax PAID in 2013 for Prior Year's Tax	$
2013 Homestead **TAXABLE** Value (MI ONLY)	$
Real Estate Taxes **PAID** in 2013:	
- Prinicpal Residence	$
- Second Home/Cottage	$
- Vacant Land	$
- Other	$
Real Estate Taxes PAID @ Closing (Provide Docs)	$
Real Estate Taxes REIMB @ Closing (Provide Docs)	($)
*****AUTO LICENSE TABS*****	$
Other Personal Property Taxes	$
Sales Tax Paid State	
- Actual Sales Tax Paid in 2013	$
- Major Purchase(s) (Vehicle, Aircraft or Boat ONLY)	$

2013 ESTIMATED TAX PAYMENTS

	FEDERAL	STATE
1ST QTR DUE 04/15/2013	$	$
2ND QTR DUE 06/17/2013	$	$
3RD QTR DUE 09/16/2013	$	$
4TH QTR DUE 01/15/2014	$	$
2012 OVERPAYMENT APPLIED TO 2013	$	$

2013 CREDITS

HIGHER EDUCATION EXPENSES

Student 1 ______
School ______
Qualified Tuition & Fees Paid in 2013 $ ______
Books & Required Supplies Paid in 2013: $ ______
Student has completed first 4 years of college Y N
Student has been convicted of felony? Y N

Student 2 ______
School ______
Qualified Tuition & Fees Paid in 2013 $ ______
Books & Required Supplies Paid in 2013: $ ______
Student has completed first 4 years of college Y N
Student has been convicted of felony? Y N

Student 3 ______
School ______
Qualified Tuition & Fees Paid in 2013 $ ______
Books & Required Supplies Paid in 2013: $ ______
Student has completed first 4 years of college Y N
Student has been convicted of felony? Y N

MI PROPERTY TAX CREDIT

No. of Months ______ Rent per Month $ ______
Landlord ______
Address ______
City ______ ST ______ ZIP ______

No. of Months ______ Rent per Month $ ______
Landlord ______
Address ______
City ______ ST ______ ZIP ______

CHILD & DEPENDENT CARE EXPENSES

Child 1 ______ $ ______
Caretaker ______
Address ______
City ______ ST ______ ZIP ______

Child 2 ______ $ ______
Caretaker ______
Address ______
City ______ ST ______ ZIP ______

ADOPTION CREDIT

Child 1 ______
Was the child: ❑ Disabled ❑ Special Needs ❑ Foreign Child
Was the adoption final in 2013 or earlier? ❑ Yes ❑ No
Qualified Adoption Expenses
Adoption Fees $ ______
Attorney(s) Fees $ ______
Court Costs $ ______
Travel Expenses (incl. Meals & Lodging) $ ______
Re-adoption Expenses re: Foreign Child $ ______
Did you receive employer-provided benefits received $

Child 2 ______
Was the child: ❑ Disabled ❑ Special Needs ❑ Foreign Child
Was the adoption final in 2013 or earlier? ❑ Yes ❑ No
Qualified Adoption Expenses
Adoption Fees $ ______
Attorney(s) Fees $ ______
Court Costs $ ______
Travel Expenses (incl. Meals & Lodging) $ ______
Re-adoption Expenses re: Foreign Child $ ______
Did you receive employer-provided benefits received $

QUALIFIED PLUG-IN ELECTRIC VEHICLE CREDIT (IRC SEC. 30D)

Did you purchase any of the following Electric Vehicles during 2013?

Date Purchased

- ❑ 2014 Accord Plug-in Vehicle
- ❑ 2012 AMP GCE
- ❑ 2012 AMP MLE
- ❑ 2011/2012 Azure Dynamics Transit Connect
- ❑ 2014 BMW i3 Sedan with Ranger Extender
- ❑ 2014 BMW i3 Sedan
- ❑ 2012 BYD e6 Electric Vehicle
- ❑ 2013 Fiat 500e
- ❑ 2010, 2012 CODA Sedan
- ❑ 2011, 2012 EVI-MD (Medium Duty) Electric Truck
- ❑ 2011, 2012 EVI-WI (Walk-In) Electric Truck
- ❑ 2010 EMC Model E36 7 Passenger Wagon
- ❑ 2010 EMC Model E36t Pick-up Truck
- ❑ 2010 EMC Model E36v Utility Van
- ❑ 2012 Fisker Karma Sedan
- ❑ 2012, 2013, 2014 Ford Focus Electric
- ❑ 2013 Ford C-MAX Energi
- ❑ 2013, 2014 Ford Fusion Energi
- ❑ 2011, 2012, 2013, 2014 Chevrolet Volt
- ❑ 2014 Chevrolet Spark EV
- ❑ 2013 Mercedes-Benz smart Coupe/Cabrio EV
- ❑ 2012 Mitsubishi i-MiEV
- ❑ 2011, 2012, 2013 Nissan Leaf
- ❑ 2014 Porsche Panamera S E Hybrid
- ❑ 2011 smart fortwo Electric Drive Vehicle
- ❑ 2008, 2009, 2010, 2011 Tesla Roadster
- ❑ 2012, 2013 Tesla Model S Vehicle
- ❑ 2011 Think City EV
- ❑ 2012, 2013, 2014 Toyota Prius Plug-in
- ❑ 2012, 2013, 2014 Toyota RAV4 EV
- ❑ 2011 Wheego LiFe Electric Vehicle

2013 SCHEDULE C INCOME & EXPENSES

	BUSINESS 1	BUSINESS 2
Business Name		
Address		
City/State/Zip		
Business Activity		
Product or Service		
Were payments made in 2013 that would require Form(s) 1099?	❑ Yes ❑ No	❑ Yes ❑ No
Did you file all required Form(s) 1099?	❑ Yes ❑ No	❑ Yes ❑ No
Gross Receipts	$	$
Returns & Allowances	$	$
Other Income	$	$
Cost of Goods Sold		
Beginning Inventory as of 01/01/13 (At Cost)	$	$
Purchases	$	$
Cost of Labor	$	$
Materials & Supplies UNDER $200 *New rules effective 01/01/14*	$	$
Materials & Supplies OVER $200 *New rules effective 01/01/14*	$	$
Other Costs	$	$
Ending Inventory as of 12/31/13 (At Cost)	$	$
Advertising	$	$
Bank Charges	$	$
Commissions & Fees	$	$
Dues & Publications	$	$
Insurance - Health	$	$
Insurance - Other	$	$
Interest	$	$
Licenses	$	$
Legal & Professional	$	$
Meals & Entertainment	$	$
Office Expense	$	$
Postage & Freight	$	$
Rent	$	$
Repairs & Maintenance UNDER $500 *New rules effective 01/01/14*	$	$
Repairs & Maintenance OVER $500 *New rules effective 01/01/14*	$	$
Taxes	$	$
Telephone	$	$
Travel	$	$
Utilities	$	$
Wages	$	$

AUTO

	BUSINESS 1	BUSINESS 2
Auto (Mileage):		
- Total Miles	#	#
- Business Miles ($0.565 per mile)	#	#
Auto (Actual Expenses):		
Base Price-Trade In+Sales Tax	$	$
Car Wash	$	$
Gasoline	$	$
Insurance	$	$
Interest	$	$
Lease Vehicle Payments	$	$
Oil Changes	$	$
Parking Fees/Tools	$	$
Registration	$	$
Repairs & Maintenance	$	$
Tires	$	$

2013 RENTAL/ROYALTY INCOME & EXPENSES

	PROPERTY 1	PROPERTY 2	PROPERTY 3
Property Type (Circle One)	1 2 3 4 5 6 7 8	1 2 3 4 5 6 7 8	1 2 3 4 5 6 7 8

1=Single Family Residence 2=Multi Family Residence 3=Vacation/Short-Term 4=Commercial 5=Land 6=Royalties 7=Self-Rental 8=Other

	PROPERTY 1	PROPERTY 2	PROPERTY 3
Address			
City/State/Zip			
Did you actively participate in rental?	❑ Yes ❑ No	❑ Yes ❑ No	❑ Yes ❑ No

Did more than 1/2 of the personal services performed in all trades/businesses involve real property trades/business which you materially participated? ❑ Yes ❑ No

Did you perform more than 750 hours of services in real property trades/business in which you materially participated? ❑ Yes ❑ No

	PROPERTY 1	PROPERTY 2	PROPERTY 3
# Days Rented @ Fair Rental Value			
# Days Used Personally			
Gross Rents	$	$	$
Gross Royalties	$	$	$
Advertising	$	$	$
Association Fees	$	$	$
Cleaning & Maintenance	$	$	$
Commissions	$	$	$
Insurance	$	$	$
Legal & Professional	$	$	$
Management Fees	$	$	$
Mortgage Interest	$	$	$
- Form 1098	$	$	$
- Other	$	$	$
Painting & Decorating	$	$	$
Repairs UNDER $500 (*New rules effective 01/01/14*)	$	$	$
Supplies UNDER $200 (*New rules effective 01/01/14*)	$	$	$
Supplies OVER $200 (*New rules effective 01/01/14*)	$	$	$
Taxes	$	$	$
Utilities	$	$	$
Other: ______	$	$	$
Other: ______	$	$	$

***Major Repairs OVER $500* (*new rules effective 01/01/14*):**

	PROPERTY 1	PROPERTY 2	PROPERTY 3
______	$	$	$
Date Placed in Service	/ /	/ /	/ /
______	$	$	$
Date Placed in Service	/ /	/ /	/ /

AUTO

	PROPERTY 1	PROPERTY 2	PROPERTY 3
Auto (Mileage):			
- Total Miles	#	#	#
- Business Miles ($0.565 per mile)	#	#	#
Auto (Actual Expenses):			
Base Price-Trade In+Sales Tax	$	$	$
Car Wash	$	$	$
Gasoline	$	$	$
Insurance	$	$	$
Interest	$	$	$
Lease Payments	$	$	$
Oil Changes	$	$	$
Parking Fees	$	$	$
Registration	$	$	$
Repairs & Maintenance	$	$	$
Tires	$	$	$

NOTES

Please list any questions or additional information you may have. If in response to a specific page, please reference page & item in question.

GURIN & GURIN, P.C. PRIVACY POLICY

We value and trust your confidence, and we want to assure that your personal information is kept completely confidential by our office. As a tax and accounting firm, we adhere to the highest level of professional and ethical responsibility and obligations to protect the confidentiality of all client information.

This *Privacy Policy* will help you understand what information we collect about you, the limited times we may share it with others and what measures we take to protect your privacy.

What Personal Information Do We Collect?

In order to meet your needs in the course of tax preparation/planning and tax compliance engagements for you, we collect various types of personal information about you from the following sources:

- Information we receive from you in person, by telephone, mail or electronic mail through our website, on tax preparation worksheets and on other documents or forms we use in preparing your tax returns or providing other services for you. Such information includes, but is not limited to, your name, social security number, income, investment and other assets, and other tax and financial information about you;
- Information we receive from others about your transactions or relationships with them. Such information includes, but is not limited to, investment loan or banking activity, balances or account numbers, legal agreements and documents, and other information we gather in the course of providing services to you;
- Information we receive from you when your browser interacts with our website. This could include information transmitted on an Internet "cookie" such as a password to our site, your preferences on the site and your Internet Provider's address; and
- Information we receive from a consumer reporting agency such as your credit history and outstanding loan balances.

Is Personal Information Shared With Others?

We do not share personal information about you with anyone without your express written consent, except as permitted by law and as described below.

The law permits or requires disclosure in certain instances, such as if we must share information to protect against fraud, in response to a court subpoena, or as part of actual or threatened legal proceedings or alternate dispute resolution.

We may share information we collect (except for consumer reporting information which we do not disclose) to nonaffiliated companies which perform support services on our behalf (i.e. tax or data processing, transmission of electronic returns or data, records retention and mailing services). We **DO NOT** sell or otherwise disclose our client list or any of your information to outside companies for their marketing or solicitation use.

We may also share your information with other parties that help assure our compliance with professional accounting standards (i.e. peer review) or that conduct due diligence procedures.

How Do We Protect the Confidentiality & Security of Your Personal Information?

Keeping your information confidential and secure is of utmost importance to us. We follow standard industry practices to actively protect the confidentiality, security and integrity of your personal information. We also maintain physical, electronic and procedural safeguards to protect your personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. And, we take appropriate precautions before sharing your information with any outside party.

Should you become an inactive client or should our relationship end, for whatever reason, we will continue to protect the confidentiality and security of your personal information in accordance with this *Privacy Policy*.

Our Pledge to You

As accountants, our professional ethical obligations and responsibilities have always demanded no less than the highest regard and duties for the confidentiality of your personal information and the security of your privacy. We will protect your personal information, use it only as necessary and perform our engagements so as to always maintain your trust and confidence in us.

Thank you for allowing us to be of service; we truly value our relationship with you. We hope you view our firm as your most trusted advisor, and we will work to continue earning that trust. Please call us anytime you have questions or if we may be of further service to you.

Gurin & Gurin P.C.