Name	•
name	۰

TO BE ANSWERED BY ALL CLIENTS:

n assure the accuracy of your tax return and that all possible tax deductions are taken please complete the	following que
---	---------------

yes No Did you move bed yes No Did you add any emetal roofs) to you yes No Did you sell or gift complete page 3 or yes No Did you sell any gyes No Did you make a gyes No Did you employ a yes No Did you make an in yes No Did you make an in yes No Did you make an ingention and itemized yes No Did you transfer or yes No Did you make comyes No Did you have an incountry, such as a yes No Did you receive a yes No Did you receive a yes No Did you calaim the yes No Did you claim the yes No Did you have an yes not yet have you ever had yet of the yet of the yet of	income, deductions, and other information necessary for to substantiate data. Date
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to your Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift yes No Did you sell any gift yes No Did you sell any gift yes No Did you make a gift yes No Did you employ a Yes No Did you make and yes No Did you contributed Yes No Did you transfer or Yes No Did you make contyes No Did you have an yes No Did you have an in country, such as a Yes No Did you have an over institution? Yes No Did you receive a Yes No Did you claim the Yes No Did you claim the Yes No Did you claim the Yes No Financial Plannic PLANNER TM profest Retirement Planding Life Insurance (Other	ers Financial Services, Member FINRA, SIPC income, deductions, and other information necessary for
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a gift yes No Did you employ a Yes No Did you make a gift yes No Did you pay addit Yes No Did you make an ingenies of yes No Did you make an ingenies No Did you transfer or Yes No Did you make contyes No Did you make contyes No Did you have an ingenies No Did you receive a Yes No Did you receive a Yes No Did you claim the Yes No Pid you contributed Yes No Pid you claim the Yes No Pid you contributed Yes No Pid you contri	ers Financial Services, Member FINRA, SIPC
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you buy a matal roofs) to yo Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a gray Yes No Did you make a gray Yes No Did you make a gray Yes No Did you make an ingain itemized Yes No Did you make an ingain itemized Yes No Did you transfer or Yes No Did you make con Yes No Did you make con Yes No Did you have any Yes No Did you have any Yes No Did you have an ingain itemized Yes No Did you have an over institution? Yes No Have you ever had Yes No Did you claim the Yes No Financial Planni. PLANNER TM profest Retirement Planning Life Insurance (Other	ers Financial Services, Member FINRA, SIPC
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift you not you sell any gift you not you sell any gift you not you make a gift yes No Did you sell any gift you not you have an you you have an own institution? Yes No Did you receive a yes No Did you receive a yes No Did you claim the yes No Pinancial Planning PLANNER TM profesting the you profesting the your profesting not you have must you would not you claim the yes No Pinancial Planning PLANNER TM profesting not you have an you not you have an you would you claim the Yes No Retirement Planning PLANNER TM profesting not you have you would not you have an you have you ever had yes No Retirement Planning PLANNER TM profesting not you have yo	e
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift you not you sell any gift you not you sell any gift you not you make a gift yes No Did you sell any gift you not you have an you you have an own institution? Yes No Did you receive a yes No Did you receive a yes No Did you claim the yes No Pinancial Planning PLANNER TM profesting the you profesting the your profesting not you have must you would not you claim the yes No Pinancial Planning PLANNER TM profesting not you have an you not you have an you would you claim the Yes No Retirement Planning PLANNER TM profesting not you have you would not you have an you have you ever had yes No Retirement Planning PLANNER TM profesting not you have yo	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift you not you sell any gift you not you sell any gift you not you make a gift yes No Did you sell any gift you not you have an you you have an own institution? Yes No Did you receive a yes No Did you receive a yes No Did you claim the yes No Pinancial Planning PLANNER TM profesting the you profesting the your profesting not you have must you would not you claim the yes No Pinancial Planning PLANNER TM profesting not you have an you not you have an you would you claim the Yes No Retirement Planning PLANNER TM profesting not you have you would not you have an you have you ever had yes No Retirement Planning PLANNER TM profesting not you have yo	7
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift you not you sell any gift you not you sell any gift you not you make a gift yes No Did you sell any gift you not you have an you you have an own institution? Yes No Did you receive a yes No Did you receive a yes No Did you claim the yes No Pinancial Planning PLANNER TM profesting the you profesting the your profesting not you have must you would not you claim the yes No Pinancial Planning PLANNER TM profesting not you have an you not you have an you would you claim the Yes No Retirement Planning PLANNER TM profesting not you have you would not you have an you have you ever had yes No Retirement Planning PLANNER TM profesting not you have yo	Savings riall
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift you not you sell any gift you not you make a gift yes No Did you make a gift yes No Did you employ a Yes No Did you make an in yes No Did you make an in yes No Did you make an in yes No Did you transfer or yes No Did you make com Yes No Did you have an in country, such as a Yes No Did you receive a Yes No Did you receive a Yes No Did you calim the Yes No Did you claim the Yes No Did you can you was you	RA College Funding Savings Plan
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any go Yes No Did you make a go Yes No Did you employ a Yes No Did you make an go Yes No Did you have a can bring an itemized Yes No Did you transfer of Yes No Did you make con Yes No Did you have an go Yes No Did you have an go Yes No Did you have an go Yes No Did you receive a Yes No Did you claim the	DA College Eynding
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to yo Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a gyes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an ing an itemized Yes No Did you transfer or Yes No Did you make comyes No Did you have an incountry, such as a Yes No Did you have an incountry, such as a Yes No Did you have an over institution? Yes No Have you ever had Yes No Did you claim the	y Kari Pel, a CERTIFIED FINANCIAL
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you buy a martal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift yes No Did you sell any gift yes No Did you make a gift yes No Did you make a gift yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you make an in Yes No Did you transfer or Yes No Did you make com Yes No Did you have an in country, such as a Yes No Did you have an over institution? Yes No Have you ever had	you are responsible for paying back each year?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to yo Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a grayes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you contribute Yes No Did you transfer or Yes No Did you make con Yes No Did you make con Yes No Did you have an in Country, such as a Yes No Did you have an over institution?	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to yo Yes No Did you sell or gift complete page 3 or Yes No Did you sell any if Yes No Did you make a gift Yes No Did you make an if Yes No Did you transfer of Yes No Did you make contyes No Did you make contyes No Did you pay morting Yes No Did you pay morting Yes No Did you have an yes No Did you have an in country, such as a Yes No Did you receive a Yes No Did you have an over Yes No Did you have All Yes	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you buy a mater Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift yes No Did you make a gift yes No Did you make a gift yes No Did you employ a Yes No Did you make an interpretation of Yes No Did you make an interpretation yes No Did you transfer or Yes No Did you make comy yes No Did you pay morting yes No Did you have any yes No Did you have an incountry, such as a	and directly deposited to more than one financial
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a gift yes No Did you employ a Yes No Did you employ a Yes No Did you pay addit Yes No Did you make an in Yes No Did you have a cabring an itemized Yes No Did you transfer of Yes No Did you make contyes No Did you make contyes No Did you make contyes No Did you have any Yes No Did you have an in Yes No Did you have any Yes No Did you have an in Yes	in a foreign country or from a foreign entity?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gift yes No Did you sell any gift yes No Did you make a gift yes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you make an in Yes No Did you have a cabring an itemized Yes No Did you transfer of Yes No Did you make con Yes No Did you pay morts Yes No Did you have any	r financial account?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a maximum Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you make an in Yes No Did you have a cabring an itemized Yes No Did you transfer of Yes No Did you make con Yes No Did you pay morts	ver a financial account in a foreign
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a maximum Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you have a cabring an itemized Yes No Did you transfer of Yes No Did you make con Yes No Did you make Yes No Did you make Con Yes No Did you Make Yes No Did you Yes No Did y	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you add any emetal roofs) to you Yes No Did you buy a may Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you sell any gyes No Did you make a gift Yes No Did you employ a Yes No Did you employ a Yes No Did you make an in Yes No Did you make an in Yes No Did you have a carbring an itemized Yes No Did you contributory Yes No Did you transfer or Yes Yes Yes Yes No Did you transfer or Yes	ered into after December 31, 2006)?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your yes No Did you buy a mary yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you make a gift yes No Did you employ a Yes No Did you employ a Yes No Did you pay addit Yes No Did you make and Yes No Did you make and Yes No Did you have a cabring an itemized Yes No Did you contribute	HSA) this year? (Do not mark "yes" for FSA)
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your yes No Did you buy a mary yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any gyes No Did you make a grayes No Did you make a grayes No Did you employ a Yes No Did you employ a Yes No Did you make and Yes No Did you have a calbring an itemized	t plan to another retirement plan?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to yo Yes No Did you buy a mary yes No Did you sell or gift complete page 3 or Yes No Did you sell any gyes No Did you sell any in Yes No Did you make a gift yes No Did you employ a Yes No Did you employ a Yes No Did you pay addit Yes No Did you make an in Yes No Did you make a call yes No Did you make an in Yes No Did you have a call	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you buy a mater Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you make a gift Yes No Did you employ a Yes No Did you employ a Yes No Did you pay addit Yes No Did you make and yes No Did you make yes No Did you make and yes No Did you make and yes No Did you make yes No Did you yes No Did you make yes No Did you ma	0% of your income? If so,
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a maximum Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you make a gift Yes No Did you employ a Yes No Did you employ a Yes No Did you pay addit	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a maximum Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you make a gift Yes No Does anyone owe Yes No Did you employ a	udit or filing of a late return?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a maximum Yes No Did you sell or gift complete page 3 or Yes No Did you sell any good Yes No Did you sell any good Yes No Did you make a gift Yes No Did you make a gift Yes No Does anyone owe	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you buy a ma Yes No Did you sell or gift complete page 3 of Yes No Did you sell any good yes No Did you sell any good yes No Did you make a gift yes No Did yes No Di	d all reasonable efforts to collect?
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a man Yes No Did you sell or gift complete page 3 or Yes No Did you sell any gres No Did you sell any great No Did you sell great No Did you sell any great No Did you sell any great No Did	
Yes No Did you use your between first and Yes No Did you move because Yes No Did you purchase Yes No Did you add any emetal roofs) to your Yes No Did you buy a marayes No Did you sell or gift complete page 3 or Yes No Did you sell any group of the service of the your self and your self and your self and you self any group of the your self and you self any group of the your self and you self any group of the your self and you self any group of the your self and you self any group of the your self and you sel	
Yes No Did you use your between first and Yes No Did you move because Yes No Did you purchase Yes No Did you add any emetal roofs) to you Yes No Did you buy a material you have a most yes No Did you sell or gift complete page 3 or gift complete page 3 or gift your have yes No Did you sell or gift you have yes No Did you sell or gift you have yes No Did you sell or gift yes No Did you yes No Did yes No Did you yes No Did yes No	
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you Yes No Did you buy a may Yes No Did you sell or gif	ement statement for both the purchase and the sale.
Yes No Did you use your between first and Yes No Did you move bed Yes No Did you purchase Yes No Did you add any e metal roofs) to you	perty or have any become worthless? If yes,
Yes No Did you use your between first and Yes No Did you move bec Yes No Did you purchase Yes No Did you add any e	
Yes No Did you use your between first and Yes No Did you move becayes No Did you purchase	
Yes No Did you use your between first and Yes No Did you move become	systems, exterior windows and doors,
Yes No Did you use your between first and	was the Sales Tax and Vehicle License Fee paid?
Yes No Did you use your	
Voc No Did vou receive in	ommute to and from work)? Did you commute
partnership, an S o	rm W 2 or 10002
	property, or acquire an interest in a
	for Student Aid (FAFSA) Form?
	r age 24 at the end of 2013?
	ne in excess of \$950, or total investment income in excess
	r immediate family during 2013?
Yes No Do you wish to de	

2013 INCOME TAX CHECKLIST FOR MINISTERS ONLY

MINISTER'S INCOME (do not include a	non-ministry income)
W-2 Wages Reported	\$
1099 Misc. Salary Reported	\$
Housing Allowance	\$
Honorarium Received	\$
Allowances (not included in W-2/1099)	
Automobile	\$
Professional Expenses	\$
Social Security	\$
Other:	\$
Pension Received	\$
Have you opted out of MINISTER'S HOUSING ALLOWANCE	f Social Security? Yes No
Total Mortgage Payments Paid in 2013	\$
Property Tax (not included in Mtg. Pymt)	\$
Insurance (not included in Mtg. Pymt)	\$
Total Rent Payments Paid in 2013	\$
Association Fees	\$
Furnishings	\$
Landscaping	\$
Maintenance/Repairs	\$
Improvements	\$
Utilities (including base rate of phone,	
cable, satellite, & internet)	\$
Other:	\$
TOTAL EXPENSES:	\$

Note: Please ask the person issuing the W-2 or 1099 Misc. to provide you with an explanation of how the final salary number was figured. This should include all compensation received by you, including allowances by classification, but not reimbursements.

Please use the Miscellaneous Deductions Section on page 2 of the Income Tax Checklist for your ministerial expenses if your income was reported on a form W-2. Use the Self-Employed Business Income and Expense Section on page 3 if you received a form 1099-MISC.