

CHRIS O'ROURKE AND ASSOCIATES, P.A.  
1623 US HWY 1, SUITE A-4  
SEBASTIAN, FL 32958  
(772) 589-0240

Dear Client:

This letter and client questionnaire is designed to help you gather the tax information needed to prepare your 2013 personal income tax return.

The Client Questionnaire asks about pertinent tax items necessary for preparing an accurate tax return. Please answer all applicable questions and attach a statement when necessary for additional information not provided in the Client Organizer.

Please answer all applicable questions and use the Notes to Preparer section to enter any additional information. The Notes to Preparer section is also available for any questions that you may have for our office.

We will also need the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions.
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.
- Medical receipts and/or Year End printouts from your pharmacy, doctor's office, and dental office.

**Please note that over the counter medications without a prescription are not tax deductible.**

Additionally, if you have a rental activity (Schedule E) or small business activity (Schedule C) and paid any individual for services in excess of \$600 for the year, please contact our office immediately as the IRS requires that 1099s be issued to those individuals by January 31, 2014.

Thank you for the opportunity to serve you.

Sincerely,

Chris O'Rourke and Associates, P.A.