

01/25/2013

Dear OZField / Angora Client,

In an effort to save you time and money, we have created the following forms. Please complete and return them to us along with the accompanying schedules and we will have your taxes prepared timely and accurately. If you have any questions, you may contact us via e-mail at tax@ozfield.com or by phone at (773) 536-9272.

Sincerely,



Orkun Ozkaymak, MBA



TAX QUESTIONNAIRE FOR U.S. RESIDENTS

Indicate with year this is for if not 2012 - _____
 Please feel free to attach additional sheets for any items.

	PRIMARY TAXPAYER	SPOUSE
Name		
Social Security Number		
Occupation		
Date of Birth		

Did your marital status change this year? _____ Yes _____ No - If yes, provide details _____

CONTACT INFORMATION

Address _____
 Phone Number(s) _____
 E-mail Address(es) _____

DEPENDENTS

Name	Relationship	SSN	Date of Birth	Number of months lived in your home

Please let us know if any of the following: Dependent did not live with you, is married, has income, is not a US citizen or green card holder, or lives with another parent. _____

INCOME DURING 2012

WAGE/SALARY INCOME (Please provide copies of all W-2's)

- Employer Name: _____ Circle One: Primary Taxpayer Spouse
 Total Wages (Box 1 from W-2): _____
 Federal Income Tax Withheld (Box 2 from W-2): _____
 State Income Tax Withheld (Box 17 from W-2): _____
- Employer Name: _____ Circle One: Primary Taxpayer Spouse
 Total Wages (Box 1 from W-2): _____
 Federal Income Tax Withheld (Box 2 from W-2): _____
 State Income Tax Withheld (Box 17 from W-2): _____

INTEREST INCOME:

Name of Bank/Payor _____ Interest Income Rec'd _____
 Name of Bank/Payor _____ Interest Income Rec'd _____

DIVIDEND INCOME (include 1099's if tax was withheld):

Description/Payor	Ordinary Dividend (Box 1A of 1099)	Qualified Portion (Box 1B of 1099)	Capital Gain Distribution (Box 2A of 1099)
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

If there were foreign taxes withheld from any please provide further information.

CAPITAL GAINS – NOTE: Please provide us with the realized gain/loss report from your broker for in order to comply with new IRS filing requirements.

Description	Date Acquired	Date Sold	Sales price	Original cost plus purchase expenses
			\$	\$
			\$	\$
			\$	\$

If there were foreign taxes paid on or U.S. taxes withheld from these transactions let us know.

OTHER INCOME: (for instance, state tax refunds, director's fees, retirement, social security, alimony received, partnership income, gambling winnings, etc.):

Description/Payor	Amount of income	Tax withheld from this income	Explanation
	\$	\$	
	\$	\$	
	\$	\$	

If taxes were withheld from this income, please attach the 1099 or similar statement.

OTHER QUESTIONS	YES	NO	EXPLANATION/ADDITIONAL INFO.
1. Did you move in 2012?			
2. Did you sell any property in 2012?			
3. Did you purchase a home in 2012?			
4. Did you or your spouse have self-employment income or work as an independent contractor in 2012? If so, please attach statement showing 2012 income and expenses or ask for our Self-Employment Questionnaire.			
5. Do you have any rental properties? If so, please attach statement showing 2012 income and expenses or ask for our Rental Property Questionnaire.			
6. IMPORTANT: Did you have any foreign (non-US) bank accounts, foreign corporations, foreign trusts, foreign mutual funds not part of your U.S. brokerage account, or any foreign financial assets, etc? If yes, please explain. Let us know if you have questions.			
7. Did you pay any alimony?			
8. Did you have any mortgage debt forgiven?			



DEDUCTIONS DURING 2012

1. Mortgage Interest:		CHECK APPLICABLE BOXES		
Name of Bank	Interest Paid	Principal Residence	Home Equity Loan	Secondary Residence
	\$			
	\$			

2. Did you refinance your mortgage this year? _____ Yes _____ No
3. Real Estate/Property Taxes on your principal residence (if in CA please provide copy of bill):

4. Real Estate/Property Taxes on other property (describe): _____
5. Car Registration Taxes paid as part of your annual registration: _____
6. Did you pay state taxes or receive any state tax refunds other than shown on your prior year return?
_____ Yes _____ No If so, please indicate: _____
7. Contributions to Charities: _____
8. Medical Expenses (including insurance premiums): _____ (Please note a benefit is only obtained if your expenses exceed a percentage of your gross income)
9. Did you contribute to an IRA/Roth IRA or similar plan (do not include 401(K))? _____ Yes _____ No
Please provide details: _____
10. Describe any residential energy improvements to your home (qualifying improvements can be found at: <http://www.irs.gov/pub/irs-pdf/f5695.pdf>): _____
11. Provide details of any higher education expenses or student loan interest paid (include who for):

12. Did you pay childcare/daycare costs so your spouse could work or go to school? _____ Yes _____ No
13. Other deductions (please describe): _____

Did you make payments of estimated taxes to federal/state (i.e. quarterly payments)? If so, provide details: _____

If you would like any refund directly deposited to a bank account, please provide the following:
 Routing # _____ Account Number _____ Circle one: Checking Savings

Please provide any additional information which may be relevant to your taxes or any questions you have:

HAVE QUESTIONS OR NEED FURTHER INFORMATION?

E-mail us at tax@ozfield.com. If you e-mail/mail this form to us along with your prior year return we can reply with a fee quote for your approval and the return(s) can usually be prepared quickly. We ask for half the fee to begin the work and then the balance is due upon completion. Our main U.S. phone numbers are (773) 536-9272 and (312) 421-9790. Secure e-faxes can be sent to (312) 238-9639.