

299 Concord Avenue  
Cambridge, MA 02138  
617-492-5152  
Fax 617-492-5747

# *Donahue & Associates*

ACCOUNTANTS AND TAX CONSULTANTS

www.donahuecpa.com

66A L Street  
South Boston, MA 02127  
617-268-6358  
Fax 617-268-4606

Dear Client:

Tax time is here again and we look forward to meeting your needs for efficient and timely completion of your tax returns.

The receptionist, at the South Boston or Cambridge office, should be contacted at the numbers shown. Appointments, other than those prearranged, are scheduled at one or one and a half-hour intervals. Additional time should be requested if your situation is complicated or you simply need more time. We will take whatever time is necessary to file a proper return for you and answer your questions.

During the tax season months January thru April 15<sup>th</sup> our hours are as shown below. Thereafter we go back to our regular schedule Monday thru Friday 8:30AM to 5:00PM.

	<u>Cambridge</u>		<u>South Boston</u>
Weekdays	8:30 AM to 9:00 PM	Weekdays	8:30 AM to 9:00 PM
Saturday	8:30 AM to 6:00 PM	Saturday	8:30 AM to 6:00 PM
Sunday	1:30 PM to 6:00 PM	Sunday	10:00 AM to 4:00 PM

Please review **THINGS TO BRING LIST** and complete **DATA SHEETS**. Highly qualified and experienced associates are available to prepare your returns to assure **YOU PAY THE LOWEST TAX THE LAW ALLOWS**.

Electronic filing of Federal and MA returns will be performed at no additional charge when our fee is paid on the initial visit. Prepaid tax returns will be mailed to you; postage free shortly after electronic filing acceptance is received from the tax authorities.

MINIMUM FEES	FORM 1040EZ/1040A (Short)	\$ 150.00 and UP
	FORM 1040 (Long)	\$ 225.00 and UP

Your continued confidence in us is much appreciated. Integrity and excellence in tax preparation and accounting in a friendly atmosphere is what we intend to provide. If we fall short, please let Ed or Jeff know personally. Thank you for your patronage and especially for your many fine referrals.

(Please try to keep your scheduled appointment, because reschedules may be difficult.)

THINGS TO BRING LIST

1. All copies of W-2, 1099 and K-1 forms
2. Year-end lender loan statement form 1098, settlement sheets regarding refinanced or property purchased or property sold during the year.
3. Form 1099 reporting all mutual fund and stock sales for 2013 as well as purchase data and cost information.
4. Form 1099 reporting unemployment, state tax refunds, social security, gambling, retirement distribution and rollovers.
5. Name, address and **identification numbers** of all childcare providers.
6. All correspondence from IRS and State tax authorities.
7. Anything else you consider maybe helpful.

WHAT HAS CHANGED?

	Yes	No
1. Has your address changed?	___	___
2. Do you want \$3.00 to go to the Presidential Election Fund?	___	___
3. Has your filing status changed? (single, joint, head of household)	___	___
4. Were you or your spouse age 65 on January 1, 2013 or blind?	___	___
5. Dependents:		
a. Do you have anyone living with you who may now qualify?	___	___
b. Are your children 19 as of Dec. 31, 2013 and not a student?	___	___
c. Do you provide support for anyone else?	___	___
d. If divorced: (1) does the agreement specify you obtain dependents exemption? (2) has your (ex) signed form 8332?	___	___
e. Has your child (under 18) income of \$750 or more?	___	___
f. Is your student child age 24 on Dec. 31, 2013?	___	___
g. Did you adopt a child in 2013?	___	___
6. Do you have a dependent(s) that is in 1 <sup>st</sup> or 4 <sup>th</sup> year of college? If yes? # of dependents ___ Tuition and fees paid in 2013 \$ ___ EA	___	___
7. Have you, wife or dependents paid tuition, fees etc Other than shown in (6) above? If yes, amount paid \$ _____	___	___
8. Travel expense:		
a. Did you seek new work in your current trade or business?	___	___
b. Do you travel to more than one place of work?	___	___
c. Did you have an auto collision or other casualty in 2013?	___	___
9. Did you contribute to an IRA, Keogh, 401K or Simple for 2013?	___	___
10. Did you retire in 2013?	___	___
11. Did you pay any alimony or separate maintenance?	___	___
12. Did you pay estimated taxes for 2013? (Indicate amounts & dates paid by quarter)		
Federal 4/15/ _____ 6/15 _____ 9/15 _____ 1/15/14 _____		
Mass 4/15 _____ 6/15 _____ 9/15 _____ 1/15/14 _____		
13. Did you pay any major sales taxes during 2013 (boat/car)?	___	___
14. Please list below as reminders any questions you have.		
15. If you are a new client, please bring in, 2010, 2011 and 2012 tax returns.	___	___
16. Have you done any energy saving improvements to your home? Explain	___	___
17. If you rent provide amount paid in 2013?		

\_\_\_\_\_

\_\_\_\_\_