2013 Tax Information

General Information

	First Name	I.	Last Name	Social Security Number	Date of Birth	Blind Y/N	Disabled Y/N
Taxpayer							
Spouse							

	Home Address	City	State	Zip Code	Occupation
Taxpayer	cddgsd				
Spouse					

	Email address	Business Phone	Home Phone	Cell Phone
Taxpayer				
Spouse				

Dependent Information

First Name	I.	Last Name	Relation to Taxpayer	Social Security Number	Date of birth	College or Day Care Expense Y/N

*Please attach forms 1098 and college expense details for dependents(s).
*Please attach day care statement(s) for dependent care.

Foreign Bank Accounts

If you had, in all foreign accounts combined, over $10,000 at any time during 2012, please provide information below for each account. This is required to be reported to the Treasury Department.

Type of Account (Checking, Savings, Security, Etc.)	
Account Number	
Name of Financial Institution	
Maximum Account Value in 2012	
Address of Financial Institution	

*Noncompliance could result in severe penalties.
*Please let us know if you have Canadian retirement accounts.

Income

*Please check the box yes or no to specify whether the line item affects your 2013 taxes and attach

	Yes *Check the box	No	Attach Form referenced
Wages, salaries, tips, etc.	◯	◯	W-2
Tax-exempt interest	◯	◯	1099-INT
Taxable interest and/or dividends	◯	◯	1099-DIV
Taxable state refunds	◯	◯	1099-G
Gross business income	◯	◯	1099-MISC
Capital gain (or loss)	◯	◯	1099-B
Other gains (or losses)	◯	◯	HUD Stmt., etc.
IRA and pension distributions	◯	◯	1099-R
Rental real estate	◯	◯	1099-MISC
Royalty Income	◯	◯	1099-MISC
Partnerships, S corporations, etc.	◯	◯	K-1
Unemployment compensation	◯	◯	1099-G
Social Security benefits, Railroad Retirement, etc.	◯	◯	SSA-1099
Gambling Income	◯	◯	W-2G
Debt forgiveness	◯	◯	1099-C
Abandoned property	◯	◯	1099-A
Jury Duty	◯	◯	Attach list

*Please ask your advisor about any income not listed

Adjustments to Income and Tax Credits

	Yes *Check the box	No	Attach Form referenced
Traditional IRA contribution	◯	◯	*Form 5498*
Tuition and fees paid	◯	◯	*1098-T*
Student Loan Interest	◯	◯	*1098-E*
Health savings account	◯	◯	*1099-SA*
Moving expenses	◯	◯	*Attach a list*
Alimony	◯	◯	*Attach a list*
Foreign taxes paid	◯	◯	*Attach a list*
Performing artist expenses	◯	◯	*Complete Business Expense Page*
National Guard or Reserve member, or fee-based government official expenses	◯	◯	*Complete Business Expense Page*

Tuition and Fees Deduction

	YES	NO	Total
Tuition and fees paid	○	○	
Financial Aid	○	○	
Scholarships	○	○	
Books and supplies	○	○	

Estimated tax payments

	Date Paid	Amount
Federal		
First Quarter due 04/15/2013		
Second Quarter due 06/15/2013		
Third Quarter due 10/15/2013		
Fourth Quarter due 01/15/2014		
Amount applied from previous year's return		
State		
First Quarter due 04/15/2012		
Second Quarter due 06/15/2012		
Third Quarter due 10/15/2012		
Fourth Quarter due 01/15/2013		
Amount applied from previous year's return		

Direct Deposit of Potential Refund

Name of US Bank	
Routing Number (9-digit number on bottom left of a check)	
Account Number	
Checking or Savings Account?	
OR ATTACH A VOIDED CHECK	

Electronic Withdrawal of any Tax Balance Due

DATE FOR ELECTRONIC WITHDRAWAL?	APRIL 15TH?	E-FILE DATE?
Name of US Bank		
Routing Number (9-digit number on bottom left of a check)		
Account Number		
Checking or Savings Account?		

Itemized and Misc. Deductions

Medical and dental expenses	Total $	
Payments to Dr., copays, etc.		
Health Insurance (not included in W-2 income)		
Prescriptions		
Hospital/Nursing Home Payments		
Misc. Other Medical		

Real estate taxes	Total $	
Principal Residence		
Second home/Vacation Home		
Other property, land, etc.		
Personal Property Taxes		

Home mortgage interest & points *Must attach form 1098 or HUD stmt

Gifts to charity	Total $	
Checks/Cash/Credit paid		*Attach list from organization
Non-cash donations		*Attach receipts for annual total over $500.00
Donated vehicle or appraised item		*Attach 1098-C

Other Deductions	Total $	
State and local taxes		
Total annual sales tax		*If purchased a new car, boat, etc., attach sales receipt
Other taxes		
Investment interest		
Casualty or theft loss(es)		*Attach insurance claim
Margin Interest		
Personal Property Taxes		
Investment Advisory Fees		*Attach advisory statement
Adoption Expenses		*Attach list
Job Search Costs		
Safe Deposit Box Fee		
Early Withdrawal Penalties		
IRA Custodial Fee		*Paid outside of the IRA account
Tax Prep Fee paid in 2013		*Paid from personal bank account
HSA Contribution for 2013		*Attach 1099-SA or 5498-SA

***This page is for expenses that may be deductions on your personal return that HAVE NOT been listed anywhere else on the organizer.

Self-Employment/Contract Labor Income

Business Name	
Business Address (if different from home)	

Type of Business (please be specific, e.g., if consultant, in what field?)	
EIN Number (if applicable)	

Gross Receipts (DO NOT include income reported on 1099MISC(s) or 1099K(s) *** attach 1099(s)	
Other Income	

Accounting fees	
Advertising	
Bank service charges	
Computer supplies	
Contract labor (including subcontractors and consultants)	
Credit card annual fees	
Dues and fees	
Education (including seminars and conferences)	
Employee pensions and benefit programs	
Entertainment and business meals	
Gifts (up to $25 per person per year is deductible)	
Insurance (Liability, malpractice, workers compensation, etc.)	
Interest (on business credit cards and loans)	
Legal and professional fees	
Licenses and fees	
Magazines, books, trade publications	
Maintenance and repairs (on equipment and/or store space)	
Office supplies	
Online fees	
Parking and tolls	
Payroll taxes-Employer (FICA, FUTA, SUTA, etc.)	
Postage, delivery, and freight costs	
Printing, copying, and fax charges	
Rent (equipment and store or office space)	
Small furnishings and equipment	
Small tools	
Telephone/Cellphone (business portion only)	
Travel (no travel meals)	
Uniforms or special work clothing	
Utilities	
Wages paid to employees	
Other Expense:	
Other Expense:	

Employee Out of Pocket Business Expenses

Employer Name	
Taxpayer's Name	

Occupation (please be specific, e.g., if consultant, in what field?)	

Reimbursements received (not included on W-2)	

Advertising	
Bank service charges	
Computer supplies	
Credit card annual fees	
Dues and fees	
Education (including seminars and conferences)	
Entertainment and business meals	
Gifts (up to $25 per person per year is deductible)	
Legal and professional fees	
Licenses and fees	
Magazines, books, trade publications	
Maintenance and repairs (on equipment and/or store space)	
Office supplies	
Online fees	
Parking and tolls	
Postage, delivery, and freight costs	
Printing, copying, and fax charges	
Small furnishings and equipment	
Small tools	
Telephone/Cellphone (business portion only)	
Travel (no travel meals)	
Uniforms or special work clothing	

Other Expense:	
Other Expense:	

Auto, Office Space and Other Business Assets

*complete a second page if more than one auto or more assets are utilized in the year.

*complete this page for EACH business or business activity and complete a separate page for farming activities, and/or rental activities.

Auto Information

Year		Mileage	
Make		Total miles driven in 2013	
Model		Total Business Only Miles	
Date Placed in Service		*Do not include commuting miles in business miles	
Date Sold (if during 2013)		(Commuting miles are generally miles from your home to your regular place of business and back.)	
Purchase Price			

*attach sales or purchase paperwork.

Gas		Repairs and Maintenance	
Insurance		Interest paid on note	
Registration & Inspection Fees		Lease payments (if not purchased)	

Home office

*Include annual totals only			
Date began using home office		HOA Fees	
Purchase price of your home		Mortgage Interest	
***Attach HUD statement & improvements info.		Rent (if home not owned)	
Number of rooms (no closets, bathrooms, utility areas)		Repairs, Maintenance, Cleaning, etc.	
Number of rooms used for business		Insurance	
-or-		Utilities	
Total Home Square Feet		Security Services	
Business Square Feet		Outside maintenance (Lawn, etc.)	

2013 Improvements

Description	Date Paid	Description	Date Paid

***If you lived in more than 1 location in 2013, please complete a separate page for each.

Business Assets

Description	Purchase Price	Purchase Date/Date Placed in Service

Rental Property Income/Expenses

-Please complete a separate page for each rental property

-complete an auto/home office page if you have associated expenses.

Property Address					
City		State		Zip Code	

Business Name (if applicable)	
EIN Number (if applicable)	

Gross Rental Income (do not include income reported on 1099MISC(s) or 1099K(s). Please attach 1099-misc(s)	
Advance Rent	
Security Deposits	

Advertising	
Bank service charges	
Contract labor (including subcontractors and consultants)	
Dues and fees	
Insurance	
Mortgage Interest (attach form 1098-INT)	
Interest Expense (on credit cards or non-mortgage loans)	
Legal and professional fees	
Licenses and fees	
Management Fees	
Maintenance and repairs	
Supplies (cleaning, etc.)	
Parking and tolls	
Postage, delivery, and freight costs	
Printing, copying, and fax charges	
Property Taxes	
Small furnishings and equipment	
Telephone/Cellphone (business portion only)	
Travel (no travel meals)	
Utilities	

Other Expense Description: ______________________________	
Other Expense Description: ______________________________	

Purchase date	
Date began renting or placed on the market to rent	
Purchase Price (please attach HUD-1 statement if bought this year)	