2013 Tax Organizer

FULLERTON BUSINESS SERVICE

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Please take time to review and complete this organizer.

This organizer helps us accurately prepare and timely file your returns.

New clients:
Please bring your returns from 2011 and 2012

PERSONAL INFORMATION (Returning clients please list any changes from last year)

	Name	SSN	Birthdate	Phone No.	Occupation
Taxpayer					

	Name	SSN	Birthdate	Phone No.	Occupation
Spouse					

	Street	City	State	ZIP
Address				
	Taxpayer Email Address __ primary contact?		Spouse Email Address __ primary contact?	

	Name	SSN	Birthdate	No. of Months Lived with You	Unearned Income 1	Earned Income	Childcare Expenses 2
Dependents							

1 Dependents under age 24 with unearned income (e.g. interest or dividends earned, stock sale proceeds) greater than $950 may need to file a return
NOTE: Dependents with unearned income greater than $1,900 are subject to their parent's tax rate. Coordination of returns between parent and child is very important.

2 Please complete Child Care expenses section on page 3

POST-HIGH SCHOOL EDUCATION (Post-High School Expenses)

	Name	Name of Institution	Tuition and Fees Paid	Room and Board	Books and Supplies	Grants and Scholarships
Students						

If you incurred expenses for post-HS education as an employee and were NOT reimbursed, see Unreimbursed Job-Related Expenses on Page 2.

NOTE: Schools provide documentation showing amount paid for tuition (1098-T). These expenses may be for any family member. If 529 plans or educational IRAs were used for some of the expenses, please provide documentaiton including any 1099-Q documents. **Please provide us with Form 1098-T.**

INCOME

✓	Income Documents Needed (Please provide these documents)
	W-2s : Wages/salaries from ALL employers
	1099-INT & 1099-DIV : Interest & Dividends - ALL accounts
	1099-B : Sales of Securities, Mutual Funds, etc.
	Year-End : Investment statements, Mutual Fund supplements
	1099-SSA / 1099-RRB : Social Security & Railroad Retirement
	1099-R : Income from Pension, IRAs and Annuities
	1099-G : Unemployment Compensation, State Tax Refund
	K-1 : Partnerships, Trusts, Estates and S-Corporations
	1099 - MISC : Non-Employee Comp, Rents, Royalties
	1099-SA HSA or MSA : Health Savings Accounts
	1099-Q : Payments from Qualified Education Accounts

Other Income	Amount
Alimony Received	
Scholarships, Fellowships and Grants	
Tips Received	
Disability and Sick Pay	
Gambling Winnings (Provide W-2G)	
Prizes and Awards	
Business Income	Please see the FBS Business Organizer
Other:	
Other:	
Other:	

ITEMIZED DEDUCTIONS

Medical Expenses 3	Amount
Insurance Premiums	
Long-term Care Insurance Prem - Taxpayer	
Long-term Care Insurance Prem - Spouse	
Prescriptions (co-pay, out-of-pocket)	
Doctor, Dentist, Chiropractor	
Hospital, Nursing Home, Home Health Care	
Glasses, Hearing Aids & Batteries	
Medical Equipment, Supplies & Rentals	
Miles Driven for Medical Reasons	
Lodging, Airfare	
Parking, Transportation or Ambulance	
Other:	

3 Do not include reimbursements or expenses paid by FLEX or HSA accounts

Taxes Paid in 2013	Amount
Real Estate (primary residence)	
Real Estate (secondary residence)	
Sales Tax on Large Purchases (boat, RV, auto)	
Personal Property Tax (e.g. DMV)	

Home Mortgage Interest	Primary Residence	Secondary Residence
First Mortgage		
Second Mortgage		
Home Equity Line		
Points Paid		
Paid to an Individual - Provide Name, Address & SS# below		
Other Investment Interest:		

Unreimbursed Job-Related Expenses 8	Taxpayer	Spouse
Union and Professional Dues		
Education and Seminars (tuition & fees)		
Books and Supplies		
Insurance: E&O, Malpractice		
Job Tools, Supplies and Equipment		
License and Fees		
Publications and Journals		
Toll Calls		
Uniforms (purchasing, cleaning) 9		
Other:		
Other:		

8 Self-Employed Individuals: For business-related expenses, please see Business Organizer
9 Uniforms must be exclusive to your work and not appropriate as normal attire.

✓	Deduction Documents Needed (Please provide these)
	Property Tax Bills/Receipts
	1098 : For mortgage interest paid
	5498-SA HSA : for Health Savings Account

Charitable Contributions 4 (documentation required)	Amount
Total Cash and Check Contributions	
Miles Driven for Charitable Purposes	
Travel for Charitable Purposes/Volunteer Expenses	
Non-Cash (In-Kind) Donations	
Other:	

4 All donations must be made to qualified non-profit organizations such as religious charity or schools. Gifts of $250 or more require donation receipt. If over $500.00, see 8283 worksheet at www.FullertonBusinessService.com/tax-tools to provide details. NOTE: Do not include contributions to political organizations.

Miscellaneous Deductions 5	Taxpayer	Spouse
Attorney Fees (to protect taxable income)		
Gambling Losses		
Investment Publications and Journals		
IRA Fees Paid by Check		
Investment Expenses		
Investment Advisory Fees Paid		
Job Search Expense 6		
Job Seeking Mileage		
Safe Deposit Box		
Tax Preparation and Consulting Fees		
Other:		
Other:		

5 Self-Employed Individuals: For business-related expenses, please see Business Organizer
6 Expenses include employment service and resume fees, toll calls, etc.

Unreimbursed Job-Related Mileage	Taxpayer or Vehicle 1	Spouse or Vehicle 2
Vehicle Make / Model		
Cost or Fair Market Value		
Date Placed in Service		

2013 Mileage Detail	Taxpayer	Spouse
For Employer (business related)	mi.	mi.
To and From Work (commuting)	mi.	mi.
Reimbursement Received	$	$
Between 1st and 2nd Job	mi.	mi.
From Job to School	mi.	mi.
Total Mileage	mi.	mi.
Written Mileage Log?	☐ Yes ☐ No	☐ Yes ☐ No

OTHER INFORMATION

Child or Dependent Care Expenses		
Provider Name		
Address		
City, State, ZIP		
SSN or EIN		
Amount Paid*	$	$

* Please enter amount paid per child on page 1

Other Adjustments to Income	
Student Loan Interest	
K-12 Teacher Supplies	
Alimony Paid	
Alimony Recipient's SSN	
Moving Expenses 7	

7 Related to change of employment
(50 miles difference in commute miles required)

Estimated Taxes Paid

Due Date	Date Paid	Federal	State
April 15, 2013		$	$
June 17, 2013		$	$
September 16, 2013		$	$
January 15, 2014		$	$

2013 Retirement Contributions	Taxpayer	Spouse
Traditional IRA		
Roth IRA		
SEP IRA		
SIMPLE IRA		

✓	Please check your choices:
	I'd like to purchase Triple Protection Plan coverage (see back of letter for details)
	I'd like to receive a password-protected, electronic copy of my return (PDF) in lieu of a paper copy.
	I do NOT wish to allow my preparer to discuss my return with the IRS. Do not check this box on my return.

E-FILE INFORMATION

✓	Send E-File Authorization forms via:
	E-mail : (please list email address on page 1)
	Fax : (Fax #)
	I'll pick up : (please list phone # on page 1))

✓	Apply Refund to 2014 Taxes
	Entire Refund
	1st Quarter Estimated Payment Only
	Other Amount : $

Direct Deposit? ☐ Yes ☐ No

Electronic Funds W/D? ☐ Yes ☐ No

Bank Name:	Please select one:
Bank Routing #:	☐ Checking
Bank Account #:	☐ Savings

To ensure accuracy, please fill in above even if you have previously provided

Notes / Questions

QUESTIONS ____

Yes No DURING 2013, DID YOU OR YOUR SPOUSE…

Yes	No	
		Change bank information for direct deposit or withdrawal? (please enter bank info on page 3)
		Wish to designate $3 of your taxes to the Presidential Campaign Fund? (does not affect your taxes)
		Adopt, marry, divorce (bring copy of final decree) or have deaths in your IMMEDIATE family?
		Receive an inheritance or gift over $14,000?
		Help support anyone else?
		Have a foreign bank or investment account valued over $10,000?
		Receive Alimony?
		Buy, sell or refinance real estate? If so, please bring in closing statements.
		Sell a house for which you received the First Time Homebuyer's Credit?
		Receive the First Time Homebuyer's Credit for a home purchased before January 1, 2009?
		Make a contribution to a retirement account?
		Receive a distribution from a retirement account?
		Convert a Traditional IRA to a Roth IRA? In year 2011, 2012 or 2013?
		Rollover or transfer any IRAs or retirement accounts during the year?
		Collect any unemployment compensation?
		Have any debt forgiven? (i.e. short sale, home foreclosure, credit card balances, bankruptcy)
		Have anyone owe you money AND you have EXHAUSTED ALL reasonable efforts to collect?
		Pay interest on student loans? If so, enter on page 3.
		Move over 50 miles because of a job change? If so, please provide a list of moving expenses and total on page 3.
		Pay for long-term care insurance? If so, please enter amount on page 2.
		Receive a notice or letter from either the IRS or state taxing agency?
		Pay additional federal or state taxes as a result of an audit or filing a late return?
		Pay sales tax on an auto or boat purchase?
		Incur a loss because of damaged or stolen property? (Generally, loss must exceed 10% of your income)
		Pay any fees to an investment advisor? If so, please enter amount on page 2.
		Paid expenses for post-high school education classes or seminars? If so, please enter amount on page 1.
		Make any solar, wind, geothermal energy efficient improvements to your home?
		Purchase a hybrid, electric or alternative fuel motor vehicle?
		Take distributions from college savings or 529 plans?
		Employ anyone to work in your home?
		Purchase goods from out of state firms where no sales tax was charged? Cost $_______________
		Exercise work related stock options?
		Obtain or maintain health insurance coverage for 2014?
		Rent out your home or use it for business?
		Have dependent children under age 24 with investment revenue of $950 or more?