

RON BROWN
& ASSOCIATES
INCOME TAX & SMALL BUSINESS ACCOUNTING

2013 TAX ORGANIZER

For Appointments

Call (205)-979-5621 or visit <http://www.ronbrowntax.com>

Please Fill Out Completely
Filling in these forms saves us time and you money.

Personal Information

YOUR NAME _____ DOB _____ SS# _____

YOUR SPOUSE _____ DOB _____ SS# _____

ADDRESS _____ State _____ Zip _____ County _____

Home Phone _____ Cell Phone _____ Work Phone _____

(Call me on my) Cell _____ Home _____ Work _____ After _____ * E-Mail Address (UPDATE) _____

Filing Status

MARRIED _____ SINGLE _____ HD OF HOUSEHOLD _____

DEPENDENTS

NAME	DOB	SS#	NAME	DOB	SS#
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

INCOME (Attach a copy of W-2, 1099, INTEREST INCOME, DIVIDENDS ETC)

Source _____ Amount _____ Source _____ Amount _____

Source _____ Amount _____ Source _____ Amount _____

Other Income (Please furnish information or attach schedules)

Income tax refund (Fed) _____ State _____ Partnerships _____ Alimony received _____ Self-Employed _____ Pension _____

Sale of Property _____ Rental Property _____ IRA Distribution _____ Unemployment _____ 1099K _____

ITEMIZED DEDUCTIONS (attach & include information)

Medical expenses _____	Contributions _____	<u>Interest Paid</u>	<u>Taxes</u>
Insurance premiums _____	Church _____	1 st Mortgage _____	Property taxes _____
Doctors/Dentist _____	Misc. cash _____	2 nd Mortgage _____	Car tags _____
Insurance Reimbursement _____	Other _____	Student Loan _____	Sales tax _____

2012 Tax Preparation Fee _____ (If known)

Note: CHECK AND FURNISH INFORMATION ON THE FOLLOWING

Moving expense _____ Job Education _____ Casualty Loss _____ Job expenses (un-reimbursed) _____

Buy/Sell home _____ **(Bring with you or send settlement statement)**

Child Care _____ SS# or Fed I.D. # of Care Provider _____ Amount you paid _____ employer paid _____

Care Provider Name _____ Care Provider Address _____

____ Purchased IRA amount _____ Regular _____ Roth _____ Education _____ Converted to Roth _____ (provide details)

____ Contributed to SEP or other personal retirement **(excluding through employer)**

SPECIAL NOTES:

Make sure all SS#'s are correct especially with dependents and be sure you have a legal right to claim them

Be extra careful when dependents have a different last name from mother or father.

IRS is targeting Earned Income Credit and making sure you are eligible to receive.

Spouse: Make sure last name on social security card is same as tax return.

**** We need signed mileage logs for business miles, firefighter, police officers, nurses, emt's, court reporters, etc. ****

Business Use of Vehicle: Year 2013 is 56.5 cents per mile. **Logged.**

Please use one of the additional organizers.

Moving and Medical miles: .24 cents per mile. **Charity work:** 14 cents per mile.

Residential Energy Property Credit. Homeowners can continue to take advantage of the residential energy property credit but at lower amounts for 2011. The maximum credit allowed under the new law is \$500 over the lifetime of the taxpayer. It is reported on Form 5685 and attached to Form 1040. The \$500 amount must be reduced by the aggregate amount of energy credits taken by the taxpayer in 2006, 2007, 2009, 2010, 2011 and 2012. Here is a general list of credit dollar limitations:

\$50 for any advanced main air circulating fan;

\$150 for a qualified natural gas, propane, or oil furnace or hot water boiler;

\$300 for any item of energy-efficient building property;

\$200 for exterior windows and skylights.

Please mark the appropriate box: (You can change when we call)

(Quickest) Direct Deposit _____ Check from IRS _____

Bank Information:

Name of Bank _____ Checking Account _____ Savings Account _____

Routing Number (nine digits on left front lower corner of your check) # _____

Account Number (if joint return, **both names** must be on account) # _____

I will be paying by: Cash _____ Check _____ Debit/Credit Card _____

Thank You.

Ron Brown & Associates
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