

Here is your free tax organizer. It will help you organize your tax information and help you not to miss out on **important deductions**. Whether you do your own tax return or use the services of a CPA firm like ours, we hope you will find this useful.

Our tax preparation fees are competitive and **we will gladly quote you a fee over the phone**.

We run an efficient, friendly office - and we're here all year round to answer your questions.


If you would like to schedule an appointment, call us at **(832) 800 - 3347** or email us at [**answers@znbcpa.com**](mailto:answers@znbcpa.com)

Taxpayer Information		Spouse Information	
First Name	Initial	First Name	Initial
Last Name		Last Name	
SSN	DOB	SSN	DOB
Occupation		Occupation	
Phone #	Cell #	Phone #	Cell #
Email		Email	
Address		Address	

Dependents 1		Dependents 2	
First Name	Initial	First Name	Initial
Last Name		Last Name	
SSN	DOB	SSN	DOB
Relationship	Months Lived at Home	Relationship	Months Lived at Home

Dependents 3		Dependents 4	
First Name	Initial	First Name	Initial
Last Name		Last Name	
SSN	DOB	SSN	DOB
Relationship	Months Lived at Home	Relationship	Months Lived at Home

Alimony Received	Alimony Paid
Payor	Payee
Payor's SSN	Payee's SSN
Amount	Amount

Child Care & Dependent Expenses	 If you find this useful...
Day Care Expenses	<p><i>If you find this tax organizer useful, please feel free to contact us for copies for family and friends who may need help with their taxes or accounting.</i></p> <p><i>We specialize in serving individuals and small businesses. Call us at (832) 800-3347 or email us at answers@znbcpa.com for your complimentary consulting session. First consultation is always free!</i></p>
Dependent Care Expenses	
College Tuition Expenses	
Student 1	
Student 2	
Student 3	

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2013 Tax Organizer

Medical Expenses - Attach Detailed Schedule	Taxes Paid
Prescriptions Insurance Premiums Deductibles Paid Doctors & Dentists Eyeglasses & Contacts Other	State & Local Taxes Real Estate Taxes - Residence Retail Estate Taxes - Other Auto Licenses Personal Property Taxes Other
Interest Paid - Form 1098	Donations & Contributions - Attach Statements
Home Mortgage 1st Home Mortgage 2nd Home Mortgage Equity Line Student Loan Interest Other	By Cash or Check Property donated
Miscellaneous Deductions	Miscellaneous Deductions - Cont'd
Union/Professional Dues Investment Expenses Safe Deposit Box Rental	Moving Expenses (Move of > 50miles) Adoptions Expenses Other
Income from Business	
General Information	Accounting Information
Principal Business Activity Business Name Business Address	EIN Reporting Basis (Please check one) <input type="radio"/> Cash Basis <input type="radio"/> Accrual Basis <input type="radio"/> 1st Year Accounting System, if any
Income	Expenses - Attach detailed schedule
Gross Receipts/Sales Returns & Allowances Other Income	Advertising Payroll Expenses Meal Expenses Supplies Expenses Utilities Repairs/Maintenance Interest Health Insurance Car/Truck Total Expenses
Business Assets - Attach detailed schedule Assets Acquired during 2013 Assets Disposed during 2013 Assets Traded for other assets during 2013	Legal Fees Business Taxes Travel Office Expenses Rent Telecom Expenses Other Expenses Other Insurance Car/Truck Mileage
Cost of Goods Sold	
Inventory, Beginning of the year Purchases Purchase Discounts Materials & Supplies Other Direct Cost Inventory, End of the year	

***It's not what you earn,
It's what you keep.***



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Miscellaneous Questions

If any of the following items pertain to you or your spouse for the year 2013, please check the appropriate boxes and include all pertinent details

- | | Yes | No | |
|-----|-----------------------|-----------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1. | <input type="radio"/> | <input type="radio"/> | Did you have any interest in a bank, securities, other financial account, or trust in a foreign country at any time during 2013? |
| 2. | <input type="radio"/> | <input type="radio"/> | Did you own any foreign assets or have foreign income, pay any foreign taxes or file any foreign tax return? |
| 3. | <input type="radio"/> | <input type="radio"/> | Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year? |
| 4. | <input type="radio"/> | <input type="radio"/> | Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older? |
| 5. | <input type="radio"/> | <input type="radio"/> | Did any of your children under 19 or full-time students under 24 have investment income of >\$950? |
| 6. | <input type="radio"/> | <input type="radio"/> | Did you have any debts, including mortgages cancelled or forgiven during 2013? |
| 7. | <input type="radio"/> | <input type="radio"/> | Does anyone owe you money that has become uncollectible? |
| 8. | <input type="radio"/> | <input type="radio"/> | Did you make any energy-efficient improvements or purchases for your home? |
| 9. | <input type="radio"/> | <input type="radio"/> | Did you incur any documented casualty loss because of damaged or stolen property? |
| 10. | <input type="radio"/> | <input type="radio"/> | Did you open a Roth IRA account or convert an IRA into a Roth IRA? Or did you roll over any retirement accounts during 2013? |
| 11. | <input type="radio"/> | <input type="radio"/> | Do you have any rental property? |
| 12. | <input type="radio"/> | <input type="radio"/> | Were you or your spouse the beneficiary of COBRA premium assistance? |
| 13. | <input type="radio"/> | <input type="radio"/> | Were you granted or did you exercise any stock options? |
| 14. | <input type="radio"/> | <input type="radio"/> | Did you acquire or sell your primary residence in 2013? |

Preceding questionnaires can cause some confusion on where you can find the necessary information requested. Below is the general guideline for various categories of income and expenses and documents that those categories relate to. Please note these are general categories. If you have any questions, please call us at **(832) 800-3347** or email us at answers@znbcpa.com.

Category	Description	Documents
W-2/1099/Other	Any tax documents received from your employer(s) and customers	W-2, 1099, K-1, Checks, Deposit Slips
Investments	Money made or lost as a result of investing activities	1099R, 1099INT, 1099DIV, 1099S, 1099B
Inv Purchase	Money spent for items to resell	Invoices, Receipts
Assets	Any equipment bought or sold with expected useful life of >1yr	Invoices, Receipts, Sales Agreements
Supplies	Money spent for items used in business	Invoices, Receipts
Labor Exp	Money spent for employees, contractors	Checks, Withdrawal Slips
Office Exp	Rent, Utilities, Telecommunication (cell phone, internet) expenses	Invoices, Receipts, Bills
Car Exp	Mileage or actual money spent on gas, maintenance, tolls, insurance	Mileage Amount, Receipts, Bills
Meals/Ent	Money spent for business meals and entertainments	Receipts with attendees' names
Donations	Charitable contributions of money or items to documented organizations	Letter or receipt from organization
Legal Exp	Money paid to licensed lawyer for business purposes	Invoices, Bills from lawyer
Misc	Any other expenses that are not covered by the above tabs	Any relevant documents

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