MISCELLANOUS QUESTIONS

YES	NO	If any of the following items pertain to you or your spouse for the year 2013 please check the
☐	☐	Did you have any interest in, or signature or other authority over a bank, securities, other financial account or trust in a foreign country at any time during the year?
☐	☐	Do you own any foreign assets or have foreign income, pay any foreign taxes, or file any foreign information re-porting or tax return forms? Provide details.
☐	☐	Did you receive an inheritance from a foreign country or a distribution from a foreign trust?
☐	☐	Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year?
☐	☐	Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older?
☐	☐	Did any of your children under age 19 or full-time students under age 24 have interest and dividend income of $950 or more or total investment income of $1,900 or more?
☐	☐	Do you have a health savings account (HSA) or a medical savings account (MSA)?
☐	☐	Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old in order to enable you to work or attend school on a full-time basis? Provide details.
☐	☐	Did you pay an individual to perform in-home health care services for yourself, your spouse, or dependents?
☐	☐	Did you have expenses for a household employee?
☐	☐	Did you incur employment agency fees or job hunting expenses?
☐	☐	Did you have any education expense or student loan interest?
☐	☐	Did you incur any child care expenses? (if yes please provide details)
☐	☐	Did you incur moving expenses during the year due to a change of employment?
☐	☐	Did you have any debts, including mortgages, cancelled or forgiven or did you abandon property?
☐	☐	Does anyone owe you money that has become uncollectible?
☐	☐	Did you incur any legal fees?
☐	☐	Did you acquire or dispose of any assets (including real estate) during the year?
☐	☐	Did you purchase, sell or refinance your principal home or second home, or obtain a home equity loan?
☐	☐	Did you make any energy-efficient improvements or purchases for your home?
☐	☐	Did you incur a casualty loss because of damaged or stolen property?
☐	☐	Did you make any gifts either outright or in trust?
☐	☐	If yes, was this rolled over? (Form 1099R)
☐	☐	Did you receive any distribution from an IRA or other qualified plan? (Form 1099R)
☐	☐	Did you open a Roth IRA account or convert an IRA into a Roth IRA?
☐	☐	Were you or your spouse the beneficiary of COBRA premium assistance?
☐	☐	Were you granted or did you exercise any stock options?
☐	☐	Do you and your spouse each want to allocate $3 to the Presidential Election Campaign Fund?

Cromwell & Company, LLC

CERTIFIED PUBLIC ACCOUNTANTS

Accounting, Audit & Tax

STEPHEN CROMWELL, CPA, CTRS, CVA
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Here is your 2013 Income Tax Organizer. It will help you organize your tax information (and make sure you don't miss any important deductions). Whether you do your own tax return or use the services of a CPA firm like ourselves, we hope you'll find it useful. When you become a client, we will provide you with a customized organizer based on your prior year data.

Our fees are competitive and we'll 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. In addition to tax return preparation we offer Investment advisory and financial planning services. If you'd like to schedule an appointment, call and we'll arrange one immediately. If you just have a tax question, we'll be happy to handle it over the phone.

STEPHEN CROMWELL, CPA, CTRS, CVA

2013 INCOME TAX ORGANIZER

	TAXPAYER INFORMATION		SPOUSE INFORMATION
First Name	Initial	First Name	Initial
Last Name		Last name	
SSN#	DOB	SSN#	DOB
Occupation		Occupation	
Home #	Cell #	Home #	Cell #
Email		Email	
Address		City	
State		Zip	

FILING STATUS

☐ Single	☐ Head of Household
☐ Married	☐ Married Filing Separately

ESTIMATED TAX PAYMENTS

	FEDERAL		STATE	
	Date	Amount	Date	Amount
Overpayment				
1st Quarter				
2nd Quarter				
3rd Quarter				
4th Quarter				

DEPENDENTS

Name	
DOB	SSN#
Relationship	Months Lived at Home
Name	
DOB	SSN#
Relationship	Months Lived at Home

REFUND

Auto Deposit ☐ YES (Attach Voided Check) ☐ NO

SALARIES & WAGES –*Attach all W-2 forms*

W-2	Employer	Gross Wages
1		
2		
3		
4		

OTHER INCOME

INTEREST–Attach Forms 1099INT*	Total $
DIVIDENDS –Attach Forms 1099DIV*	Total $
CAPITAL GAINS –Attach Forms 1099B, 1099S and year-end brokerage statements with purchase date and cost of each item.	
STATE TAX REFUND –Attach Forms 1099G	
Check if you did NOT itemize in prior year ☐	
ALIMONY RECEIVED	
Payor	
Payor's SSN#	Amount
SOCIAL SECURITY BENEFITS RECEIVED –Attach Forms SSA-1099	
UNEMPLOYMENT BENEFITS RECEIVED –Attach Forms 1099G	
PENSIONS/IRA/ANNUITY DISTRIBUTIONS –Attach Forms 1099R	
*If you have ownership over a foreign bank account please provide details.	

OTHER INCOME – *Attach detailed schedules*

Including royalties, jury duty fees, finder's fees, director's fees, gambling winnings, disability payments, unreported tip income and any other income (whether taxable or not)

HOME OFFICE

Did you have a home office during the year? ☐ Yes ☐ No

If yes, attach detailed schedule of expenses including mortgage interest (or rent), real estate taxes, utilities, property insurance, maintenance & cleaning.

INCOME FROM BUSINESS OR PROFESSION

General Information

Cash Basis Accrual Basis 1st Year

Principal Business/Profession

Business Name

Business Address

City State ZIP

INCOME

Gross Receipts or Sales

Returns & Allowances

Other Income

Cost of goods sold (if applicable)

Inventory at Beginning of the year

Purchases

Cost of Labor

Materials & Supplies

Other Costs

Inventory at End of the Year

EXPENSES

Advertising

Car & Truck Expenses*

Commissions

Employee Benefits

Insurance (other than health)

Health Insurance Premiums for Self*

Interest

Legal & Professional

Office Expenses

Pensions & Profit Sharing

Rent – Vehicles, Machinery & Equipment

Rent – Business Property

Repairs & Maintenance

Supplies

Taxes – Property

Taxes – Other

Travel

Meals & Entertainment*

Utilities

Wages

Other Expenses*

* Attach detailed schedules

INTRODUCTIONS WELCOME

We welcome introductions to your family, friends & business associates who may need help with their taxes or financial planning.

RENTAL INCOME & EXPENSES

PROPERTY *	#1	#2
INCOME		
EXPENSES		
Advertising		
Association Dues		
Auto & Travel		
Cleaning / Maintenance		
Insurance		
Labor		
Professional Fees		
Miscellaneous		
Mortgage Interest		
Other Interest		
Supplies		
Taxes		
Telephone		
Utilities		
Repairs		
Improvements		
Other (Itemize):		

* Please provide full address and HUD-1 if available.

ADJUSTMENTS TO INCOME

ALIMONY PAID

Payee

Payee's SSN# Amount

Traditional / Roth Contribution

SEP / Simple Contribution

Education Expenses

Moving Expenses

Penalty on Early Withdrawal (from bank CDs)

Student Loan Interest

Tuition and Fees Deduction

ITEMIZED DEDUCTIONS

MEDICAL & DENTAL EXPENSES –Attach detailed schedules

Prescriptions

Insurance Premiums

Doctors & Dentists

Eyeglasses/Contacts

Other:

INTEREST &TAXES PAID

Mortgage Interest *

Mortgage Ins Premiums

Real Estate Tax

Income Tax Paid

Personal Property Tax

Vehicle Reg Fees (Based on Value of Vehicle)

Other Taxes:

CONTRIBUTIONS –Attach detailed schedules

By Cash or Check

Other than Cash

MISCELLANEOUS DEDUCTIONS

Union/Professional Dues

Investment Expense (attach schedule)

Tax Return Preparation Fees

Safe Deposit Box Rental

Unreimbursed Employer EXP.(Attach schedules)

Other Miscellaneous Deductions: