Tax Year 2013

WATSON CPA

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Tax Year 2013

Print Name

Phone Number ☐ Cell ☐ Home ☐ Work

Email ☐ Check if you DO NOT have e-mail

☐ Check if no change from your 2012 return in address, dependents and marital status. Otherwise, note changes on next page.

Thank you for choosing Watson CPA to assist you in preparing your 2013 taxes. We will prepare your federal and state tax returns for tax year 2013. We depend on you to provide the information we need to prepare complete and accurate returns. Although our work will not include procedures to discover irregularities or inaccuracies in the data you provide, we may ask you for clarification or additional information to ensure the returns are as complete and accurate as possible.

In this document is an organizer to help you collect the data required for your returns. This organizer will help you avoid overlooking important information, and by using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services. By providing your e-mail address above, you are authorizing us to send secure information to only this e-mail address during 2014.

Through April 15th, our office hours are Monday through Friday, 9am to 5pm. Please feel free to drop off, mail, or e-mail your tax information. If you do e-mail your information, please password-protect your file by using your social security number as your password (with no dashes or spaces) to keep your information as safe as possible. If you would like to set up an appointment, please call our office. You can find our address, phone numbers, and e-mail addresses at the top of this page as well as on our website.

Our fee will be based on the time required to prepare your federal and state tax returns for tax year 2013 at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. We will return your original records to you once your return is finalized You should securely store these records, along with all supporting documents and the copy of the tax returns we provide you for four full years. These items may be needed to prove accuracy and completeness of your returns.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

To affirm that this letter accurately summarizes your understanding of our agreement for the preparation of your tax returns for tax year 2013, please sign below on the space indicated and return it to us.

Thank you again for choosing Watson CPA to assist you in preparing your 2013 taxes. We appreciate your confidence in us.

Sincerely,
The staff at Watson CPA

Accepted by:

Taxpayer Signature ____________ Date ________ Spouse Signature ____________ Date ________

Privacy Statement

Your personal financial information is important to us, and as such, we want to share with you our commitment to safeguarding your nonpublic personal information. We will not disclose any nonpublic personal information about our clients or former clients to anyone, unless we have written permission from you to do so. We restrict access to nonpublic personal information to those professionals in our office who need to have access to this information to prepare your tax returns or other financial statements you or your business require. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information. If you have any concerns or questions regarding this privacy statement please contact us.

A. Taxpayer & Spouse Information

	Name	Soc. Sec. No.	Date of Birth	Occupation	Cell Phone
Taxpayer					
Spouse					

Street Address	City	State	Zip	Home Phone

Marital Status:

- ☐ Married
- ☐ Married - Filing Separately
- ☐ Single
  Date of Divorce (if 2013)
- ☐ Widow(er)
  Date of Death (if 2013)

Please indicate any major changes affecting you or your spouse in 2013:

- ☐ Birth
- ☐ Self-employed
- ☐ Death
- ☐ Office in home
- ☐ Marriage
- ☐ Started/ended business

Other Filing Information:

	Taxpayer	Spouse
Legally blind	☐	☐
Disabled	☐	☐
Presidential Campaign Fund	☐	☐

B. Dependents (Children & Others)

	Name (first & last)	Soc. Sec. No.	Relationship	Date of Birth	Disabled	Full-Time Student	Gross Income if over $800
1					☐	☐	
2					☐	☐	
3					☐	☐	
4					☐	☐	
5					☐	☐	
6					☐	☐	

C. Direct Deposit Information

If you would like to have any refund Direct Deposited to your bank, please attach a voided check or fill in the following information:

Name of Bank ______ Routing Number ______ Account Number ______

☐ Checking ☐ Savings

D. First Time Homebuyer Credits

Did you and your spouse file for and receive any first time homebuyer credits? If yes, please attach a statement with the year you filed for it, the amount received, and whether or not you are still living in the residence.

☐ Yes ☐ No

E. Wage & Salary Income

Did you or your spouse receive wage or salary income in 2013? If yes, please attach your W-2's.

☐ Yes ☐ No

F. Interest & Dividend Income

Did you or your spouse receive interest or dividend income in 2013? If yes, please attach your 1099-INT's and 1099-DIV's.

☐ Yes ☐ No

G. Investments Sold

Did you or your spouse sell any investments (stocks, bonds, mutual funds, gold, silver, partnership interest) in 2013? If yes, please attach your 1099-B's and Year End Realized Gain/Loss Statement from your broker.

☐ Yes ☐ No

H. Pension & Annuity Income

Did you or your spouse have any pension or annuity income in 2013? If yes, please attach your 1099-R's and 1099-SSA's.

☐ Yes ☐ No

I. IRA (Individual Retirement Acct)

Did you or your spouse contribute to or withdraw money from your IRA in 2013? If yes, please complete the following and attach your 1099-R's.

☐ Yes ☐ No

Contributions for tax year income	Amount	Date	Roth IRA
Taxpayer			☐
Spouse			☐

J. Estimated Tax Paid

Due Date	Date Paid	Federal Amount	State amount
2012 Balance carryover			
1st - 4/15/13			
2nd - 6/17/13			
3rd - 9/16/13			
4th - 1/15/14			

K. Interest Expense

Did you or your spouse have interest expense (1st or 2nd mortgage, or investment interest) in 2013? If yes, please attach your 1098's.

☐ Yes ☐ No

Did you or your spouse acquire a new mortgage (i.e. 2nd), HELOC or refinance in 2013? If yes, please attach a detailed statement explaining how the money was used. ☐ Yes ☐ No

L. Taxes Paid

Property taxes (other than rental properties)			
Auto Registration			
Sales Tax:	☐ New car	Sales tax:	
	☐ New house	Sales tax:	

M. Medical Expenses (not covered by benefit program)

NOT covered by benefit program	Amount
Prescription Drugs	
Doctor/Dentist/Orthodontist:	
Other medical/dental expenses:	
Medical mileage:	mi.
Medical insurance premiums:	

N. Other Itemized Deductions

Tax preparation fees	
Safe deposit box	
Financial planning fees	
IRA fees	

O. Other Income

Source	Amount
Child Support	
Scholarship & Grants	
Unemployment Compensation	
Worker's Compensation	
Prizes, Bonuses, Awards	
Gambling/Lottery Winnings	
Gambling/Lottery Losses	
Unreported Tips	
Director/Executor's Fees	
Commissions	
Jury Duty (not mileage reimbursement)	
Disability Income	
Veteran's Pension	
Payments from prior installment sale	
State income tax refund	
Other:	
Other:	
Other:	

P. Other Items - Please mark all that apply

- ☐ Charitable contributions
  (Please attach a separate statement for checks/cash and non-cash items. Include receipts for all donations. For non-cash donations over $500, please provide receipt, description of items, date given, cost and value of items.)
  Charitable miles: ______ mi.
- ☐ Tuition and Fees
  (Please attach a statement with the student's name, name of college, year in school of student, tuition amount, and amounts paid for books, equipment or computers. Attach receipts and 1098-T's.)
- ☐ Student loan interest
  (Please attach a statement with the student's name, the amount and to whom it was paid. Please attach 1098-E's.)
- ☐ Received self-employment or hobby income
- ☐ Received rent from real estate or other property
  (Please fill out the Rental Property Organizer)
- ☐ Received correspondence from the IRS or State taxing agency
  (Please include the correspondence)
- ☐ Received income from gravel, timber, minerals, oil, gas, copyrights, patents
- ☐ Provided a home for or helped support anyone not listed as your dependent
- ☐ Gave a gift of more than $14,000 to one or more people
- ☐ Went through bankruptcy proceedings
- ☐ Received income from raising animals or crops
- ☐ Had dependent care expenses
  (Please attach a statement with the name of the dependent, name, address, and ID number of the provider, and the amount paid)
- ☐ Paid or received alimony
  (Please attach a statement identifying if you paid or received, the amount, to/from whom, and that person's social security number)
- ☐ Had casualty or theft loss
  (Please attach a statement with the location and description of the property, amount ($) of damage, insurance reimbursements, repairs costs, and federal grants you received)
- ☐ Unreimbursed employment-related expenses (not self-employed)
  (Please attach a statement with amounts paid for dues or subscriptions, uniforms or work equipment, job travel (air, hotel, etc), continuing education, and mileage)

Q. Tax Credits - Please mark all that apply to you

- ☐ Purchased a hybrid/plug-in vehicle during the year
  (If you checked this box, please include the sales documents)
- ☐ Installed solar energy system (skylights, water heater, etc.)
  (If you checked this box, please include documentation)
- ☐ Installed energy efficient improvements
  (If you checked this box, please include documentation)
- ☐ Disabled access credit
- ☐ Fuel tax credit (farming purposes)
- ☐ Historic preservation credit
- ☐ Adoption credit