

**2013 Tax Worksheet - Please fill out and bring to your appointment!**

**Taxpayer/Spouse Name** \_\_\_\_\_ **Birthdate** \_\_\_\_\_ **Social Security # (please verify)** \_\_\_\_\_ **Occupation** \_\_\_\_\_

**NEW ADDRESS** (if any) \_\_\_\_\_  
**PHONE NUMBERS** Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_ Fax \_\_\_\_\_  
 \*\*\***Email:** \_\_\_\_\_ \*\*\*

**DEPENDENTS** (if new client, list all; otherwise, list changes from last tax year):

Name	Birthdate	Social Security # (please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>SOURCES OF INCOME:</b>	Gross	Federal Tax	State Tax
W-2 _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total W-2	\$ _____	_____	_____
1099-R _____	_____	_____	_____
Soc. Security _____	_____	_____	_____
1099-MISC _____	_____	_____	_____
_____	_____	_____	_____
Unemployment _____	_____	_____	_____
State Tax Refund _____	_____	_____	_____
Alimony Received _____	_____	_____	_____
Gambling Winnings (1099-G) _____	_____	_____	_____
Other _____	_____	_____	_____
Total Tax Withheld	_____	\$ _____	\$ _____

**2013 ESTIMATED TAX PAYMENTS:**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____
Total Amount: \$				_____

**INTEREST INCOME:**

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**DIVIDEND INCOME:**

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**SPECIAL ADJUSTMENTS:**

HSA Contributions (not on W-2) \$ \_\_\_\_\_

IRA Deposits \$ \_\_\_\_\_

Roth Deposits \$ \_\_\_\_\_

Keogh/SEP Deposits \$ \_\_\_\_\_

Alimony Paid \$ \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Educator Out-of-Pocket Expenses \$ \_\_\_\_\_

Early Withdrawal Penalties \$ \_\_\_\_\_

**EDUCATION DEDUCTIONS/CREDITS:**

Student Loan Interest \$ \_\_\_\_\_

Tuition (by individual, per form 1098T) \$ \_\_\_\_\_

Freshman/Sophomore \$ \_\_\_\_\_

Junior/Senior \$ \_\_\_\_\_

Required Books & Supplies \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_

**2013**

Please Circle your preference  
 for delivery of your copy of taxes

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**PICK UP MAIL EMAIL**