

TAX ORGANIZER  
KOLODZIEJ, EISEN & FEY, LLC  
Certified Public Accountants  
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2013

PERSONAL INFORMATION

Name				Spouse's Name			
Social Security Number:				Social Security Number:			
Occupation				Occupation			
Address							
Tel. No.			Cell No.			Work No.	
Date of Birth: Self			Spouse			E-Mail	

DEPENDENTS

Name	Birth Date	Relationship	SS#	Grade	Tuition/Books	School Name/City	Filing return
							(yes, no)
							(yes, no)
							(yes, no)
							(yes, no)

DIRECT DEPOSIT my refund (yes or no). Attach a voided check for direct deposit, unless:  
☐ I want my refund to be deposited in the same account as last year.

SOURCES OF INCOME - Please provide copies of all W-2's and 1099's

INTEREST INCOME

From Whom?	Amount
	\$
	\$
	\$
	\$
	\$

DIVIDEND INCOME

From Whom?	Amount
	\$
	\$
	\$
	\$
	\$

PENSION & IRA DISTRIBUTIONS

From Whom?	Amount
	\$
	\$
	\$

SOCIAL SECURITY RECEIVED

Self	\$
Spouse	\$

UNEMPLOYMENT RECEIVED

Self	\$
Spouse	\$

ALIMONY RECEIVED

	\$
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DO YOU HAVE A FOREIGN BANK OR INVESTMENT ACCOUNT? Y N  
- if yes please provide statement and include income above

SALES OF STOCK & MUTUAL FUND REDEMPTIONS - attach copies of 1099-B's

Security Name	#of Shares	Purchase Date	Sale Date	Proceeds	Cost

RENTAL PROPERTIES - (if any properties were purchased or sold - attach closing statement)  
- or Schedule C Information

Location			
Rental income	\$		
Expenses:			
Advertising.....	\$		
Auto & travel .....	\$		
Cleaning & maintenance.....	\$		
Commissions.....	\$		
Insurance.....	\$		
Interest.....	\$		
Legal & professional fees .....	\$		
Repairs .....	\$		
Supplies.....	\$		
Real Estate Tax.....	\$		
Utilities.....	\$		
Other .....	\$		
Major repairs & purchases.....	\$		

-please provide details on major repairs and purchases

(Continued on other side)

**Estimated tax payments:**

**Alimony paid**  
\$ \_\_\_\_\_ Recipient's SSN \_\_\_\_\_

**HSA contribution paid by Self** \$ \_\_\_\_\_  
Spouse \$ \_\_\_\_\_

2013 traditional IRA contributions (must be made by 4/15/14): Self \_\_\_\_\_ Spouse \_\_\_\_\_  
 2013 Roth IRA contributions (must be made by 4/15/14): Self \_\_\_\_\_ Spouse \_\_\_\_\_  
 Are you covered by an employer sponsored retirement plan: Self (yes, no) \_\_\_\_\_ Spouse (yes, no) \_\_\_\_\_

Payee

**Mortgage interest:**     \$ \_\_\_\_\_  
                                     \$ \_\_\_\_\_  
                                     \$ \_\_\_\_\_

**Refinance points paid....** \_\_\_\_\_ **Loan years** \_\_\_\_\_

**Student loan interest .....**\$ \_\_\_\_\_

**Primary Residence Property Taxes Paid \$** \_\_\_\_\_

**Other Property taxes paid .....**\$ \_\_\_\_\_

**Sales tax - major purchases .....**\$ \_\_\_\_\_  
    -description of major purchase \_\_\_\_\_

**Sales tax on Vehicle purchases....**\$ \_\_\_\_\_

Payee _____	\$ _____
Payee _____	\$ _____
Payee _____	\$ _____

### Miscellaneous deductions

Unions dues paid.....	\$	
Safety deposit box.....	\$	
Job related safety equipment....	\$	
Income tax return preparation...	\$	
Work uniforms .....	\$	
Cost of tools used on job.....	\$	
Professional association dues...	\$	

Doctors & dentists.....	\$	_____
Drugs.....	\$	_____
Glasses, Hearing Aids Etc.....	\$	_____
Medical Insurance .....	\$	_____
Miles driven for medical treatment		

**Noncash charitable contributions** \$ \_\_\_\_\_  
 -description, fair market value, organization  
and organization address must be provided  
 for donations over \$500

## Miles driven for charity.....\$

Employment agency fees .....	\$
Education expenses for employment ..	\$
Computer expenses .....	\$
Travel-airfare & lodging .....	\$
Business miles driven .....	\$
Meals & entertainment.....	\$
Promotion.....	\$

**Child care credit** - paid for care of child under 13 which enables you to work. Amount \$ \_\_\_\_\_  
 Provider's name \_\_\_\_\_ Complete address \_\_\_\_\_ SSN or FEIN \_\_\_\_\_

**College Tuition** paid for self or spouse      Amount \$ \_\_\_\_\_ Year in School \_\_\_\_\_  
-if tuition is paid for a dependent, fill in the amount and year in school on the front page dependent section

Did you sell your house in 2013? (yes, no). If yes, provide closing papers from sale, purchase date and cost of prior residence.  
Did you move **due to a job change**? (yes, no). If yes, provide moving expenses, addresses and dates of employment.

[illegible]