



Bowen Accounting

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Disclaimer: This is a worksheet designed to help you collect and record all of the pertinent tax information required to prepare your return. It is not a complete listing of every possible item that may effect your taxes. It is a tool to help your organize your thoughts and documents.

TAXPAYER INFORMATION

	NAME	SSN	BDAY
YOU	_____	_____	_____
SPOUSE	_____	_____	_____

NOTES: _____

CONTACT INFORMATION

ADDRESS	_____
CITY, STATE, ZIP	_____
YOUR PHONE	_____
SPOUSE PHONE	_____

DEPENDENTS

	NAME	SSN	BDAY	MO'S	STUDENT
	_____	_____	_____	_____	Y/N
	_____	_____	_____	_____	Y/N
	_____	_____	_____	_____	Y/N
	_____	_____	_____	_____	Y/N

NOTES: _____

SPECIAL QUESTIONS

DID EVERY MEMBER OF YOUR FAMILY HAVE HEALTH INSURANCE ALL YEAR?	YES	NO
DID YOU PAY ANY ESTIMATED TAX PAYMENTS	YES	NO
DID YOU SELL ANY REAL ESTATE OR LARGE PERSONAL ITEMS	YES	NO

NOTES: _____

INCOME

TYPE	COMPANY	AMOUNT	FORM
WAGES/SALARIES			W2
WAGES/SALARIES			W2
STATE REFUND (2013)			1099G
SOCIAL SECURITY			1099G
RETIREMENT			1099R
UNEMPLOYMENT			1099G
ALIMONY			
INTEREST EARNED			1099 INT
DIVIDENDS EARNED			1099 DIV
STOCK SALES (NEED DOCS)			STMNT
GAMBLING WINNINGS			W2G
REAL ESTATE SALE			SEVERAL
GIFT/PRIZE/TRUST			SEVERAL
OTHER INCOME			

NOTES: _____



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DEDUCTIONS

TYPE	COMPANY	AMOUNT	FORM?
IRA CONTRIBUTIONS			
TEACHING EXPENSES			
ALIMONY PAID			
MOVING EXPENSES			
EDUCATION EXPENSES			1098
VEHICLE TAGS			DMV
HOME MORT INTEREST			1098
2ND MORT INTEREST			1098
PROPERTY TAXES			1098/OTHR
SALES TAX (VEHICLES)			MANY
MEDICAL EXPENSES			
TAX PREP FEES			
INVESTMENT EXPENSE			STMNT
EMPLOYEE EXPENSES			
CHARITABLE DONATIONS			LETTER
CHARITABLE MILEAGE			RECORDS
NON CASH DONATIONS			GW / SA

NOTES:

BUSINESS INCOME AND EXPENSES

CATEGORY	AMOUNT	NOTES
INCOME		
ADVERTISING		
CAR & TRUCK EXPENSES		
COMMISSION AND FEES		
EQUIPMENT PURCHASES		
SELF EMP HEALTH INS		
LEGAL & PROFESSIONAL		
OFFICE EXPENSES		
REPAIRS & MAINT		
SUPPLIES		
TAXES AND LICENSES		
TRAVEL EXPENSES		
MEALS & ENTERTAINMENT		
UTILITIES (CELL PHONE)		
WAGES		

NOTES:



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RENTALS

	AMNT PROP 1	AMNT PROP 2	AMNT PROP 3
INCOME			
ADVERTISING			
TRAVEL			
CLEANING & MAINT			
MORTGAGE INSURANCE			
MORTGAGE INTEREST			
PROPERTY INSURANCE			
REPAIRS			
SUPPLIES			
PROPERTY TAXES			
UTILITIES			
DEPRECIATION			
OTHER EXPENSES			

NOTES:

NOTES

PLEASE BE AS DETAILED AS YOU WANT WITH NOTES HERE