



2023 Income Tax Organizer

****Fill this out even if nothing has changed for you. All information MUST be current!!****

No answer is considered a "No" or "n/a" response. Your answers are either required or will save you money.

Incomplete or missing Organizer or Worksheets will incur additional charges.

We are searching for deductions & planning your future. Please be complete!

GENERAL INFORMATION	
<i>Enter all names (yours, spouse's, dependents') EXACTLY as shown on social security card(s).</i>	
Your Name _____	Spouse's Name _____
Phone Number(s) _____	_____
MAILING address _____	Zip _____
Your Occupation _____	Spouse's Occupation _____
Your Birthdate _____	Spouse's Birthdate _____
Your Social Security # _____	Spouse's SS# _____
E-mail address _____	E-mail address _____
IRS PIN (if you have one) _____	IRS PIN (if you have one) _____

DEPENDENTS (You are not your own dependent. If you provided this information last year, just list dependent's name.)

Name	Social Security No.	Birthdate	Relationship	Months at home 2023

List EVERYONE who lived with you in 2023.

If your dependents have income, be sure and check with us to be sure they don't need to file.

E-filing Information	Please enclose a VOID check ONLY if we don't have one already. <i>(please mark one)</i>
	Would you like us to use the same bank account as last year for your payment/refund? Yes or No
Self-Employed?	
	Health Insurance (please enter if you have a business, corporation, farm or rental) \$ _____

Earned Income Credit

Is the child's other parent alive? If so, are you sure you can claim the child? Yes or No

Childcare Credit

Name & Address of Provider	Provider Tax ID Number	Amount paid per	Name of Child

Include SUMMER CAMP! Did YOU make these payments? Mark one > Yes or No

Stocks, bonds or investment property sold (we need ALL 1099s to complete your return)

Land/Buildings: Final settlement statement for purchase & sale, 1099B, total cost of improvements made.

Teachers! Did you (and/or your spouse) work over 900 hours as a K-12 teacher? (Max \$300)

If Yes, how much did you pay for classroom supplies, work computer, CE & PPE? You \$ _____

NOTE: If you report your expenses to the school AND the school provides you with documentation of your expenses of over \$300, then those expenses can also be deducted IF you itemize! Your Spouse \$ _____

****Provide us with a copy of your and your spouse's UNEXPIRED driver's licenses for identity theft protection.**

College Student's Name: _____	Graduate, Freshman, Sophomore, Junior or Senior (MARK one)
Paid (by anyone) for required books & fees other than that paid to the school? \$ _____	
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Paid (by anyone) for required books & fees other than that paid to the school? \$ _____	

Student Loan Interest (Income limits apply. Please provide statement showing amount paid.)

Did you pay any interest on a student loan for yourself or a dependent last year? \$ _____

Individual Retirement Plan Contributions (not thru your employer)

IRA or ROTH? (circle one)

2023 (his) \$ _____
2023 (hers) \$ _____

ENERGY CREDITS - ONLY if you have not already received the one-time \$500 credit.

MUST be "qualified" (ask the manufacturer, if you don't know) and made to your primary residence. Original use must be by the taxpayer.

****Physical Address of residence in which property was put into use:**

Personal Energy Credits (Receipt, type, date purchased and total cost, including labor)**

Existing homes only: Does not include homes under construction. Includes rentals.

Windows, doors, roofs, insulation, qualified heat pump or hot water heaters/boilers; central air conditioners; biomass stoves and gas/propane/oil furnaces.

Solar Credit (Receipt, type, date purchased and total cost, including labor)**

Homes either existing or under construction, includes rentals. Solar panels or photovoltaics

Not for spas or pools. Including batteries used with Solar and Solar water heating property.

Plug-In Electric Vehicle or Qualified Fuel Cell Motor Vehicle Credit (Receipt, type, date purchased, total cost)

Biofuel Produced in 2023: _____ gallons _____ type

Estimated Tax Payments: Fill this section out if you made payments on your federal 2023 income tax (1040).

	Due Date	Amount	Date Paid
1st Qtr	4/18/23	\$ _____	_____
2nd Qtr	6/15/23	\$ _____	_____
3rd Qtr	9/15/23	\$ _____	_____
4th Qtr	1/16/24	\$ _____	_____
Amount applied from prior year refund:		\$ _____	_____

What Applies to YOU?

Note: 1099s are MANDATORY. The IRS has them. We need them ALL.

Bring in everything on this list which applies to you for last year:

Wages, Salaries, Tips (bring W2s)

Interest Income (bring 1099-INTs)

Dividend Income (bring 1099-DIVs)

State Tax Refund (State _____ \$ _____)

Alimony Received (\$ _____)

***Business Income or Loss**

Capital Gain/Loss (see pg 1 "Stocks Bonds or Other Investment Property)

Any mail from the IRS

HSA: 1099SA, 5498SA

Other Income (list if other documentation is not provided):

Pensions, IRAs or Annuities (bring 1099R)

***Rents, Royalties, Partnerships**

***Farm Income or Loss**

Unemployment (1099G)

Social Security (Pink 1099SSA)

***Itemized Deductions**

***Office in Home**

Tax Receipts and Statements including:

IRA/ROTH contributions, Excise, Real Estate,

Personal Property, State & Local Taxes.

***Fill out the corresponding worksheet!**

ADDITIONAL CONCERNS: If you answer yes to any of the following, we'll need more information.

- ▷ Did you or your spouse or any dependent have ANYTHING to do with virtual currency (bitcoin or otherwise) during 2023?
- ▷ Are you or your spouse legally blind? If so, please mark one: You or Your Spouse
- ▷ Did you or your spouse turn 72 last year AND have a retirement plan?
- ▷ Did you or your spouse retire in the last year or do you or your spouse plan to retire this year?
- ▷ Do you expect significant changes in income, expenses or dependents this year?
- ▷ Did you receive any prizes, awards or other non-standard types of income?
- ▷ Did you receive any Form W2Gs? If yes, do you have a record of gambling losses?
- ▷ Did you suffer any federally declared disaster area losses greater than 10% of your income?
- ▷ Can you be claimed as a dependent on someone else's return?
- ▷ Did you have a child, adoption, divorce, marriage or death in your immediate family last year?
- ▷ Do you or did you have any household employees that you paid over \$2,200 last year or over \$1000 in any quarter last year?
- ▷ Did you make a gift to any individual of more than \$15,000 during the year?
- ▷ Are you involved in any bankruptcy, foreclosure or repossession proceedings?
- ▷ Did you have any income in a foreign country, did you live in a foreign country, or was the value of any of your foreign accounts over \$10,000 at any time during the past year?
- ▷ Do you have any E/EE savings bonds that matured last year on which you have not been reporting interest accrued?

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you know that our services for preparation of your return do not include auditing, review or any other verification, correspondence or assurance.

Contact Us

There are many events that occur during the year that can affect your tax situation. Negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects or a transaction or event, including the following:

- Sale or purchase of a residence or other real estate
- Significant change in income or deductions
- Receipt of notice from IRS or other revenue department
- Attainment of age 59 ^{1/2} or 72
- New income for work where you won't be paid via a W2
- Sale or purchase of a business
- Charitable contributions of property in excess of \$5000
- Converting your residence to a rental
- Drawing from or rolling over your retirement plan
- Pension or IRA distributions
- Retirement
- Job change
- Marriage
- Divorce or separation
- New income from rent
- Taking out a loan
- Do you want to start an IRA or ROTH?
- Do you have taxable money in your 401K?

*It's our goal to save you money any way we can! Call us for help with...
Investing, College, Estate & Retirement Planning & More!*



TAX

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