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ORGANIZER

For Your Income Tax Return Information For Tax Year 2023

Taxpayer Information

Personal Information

First name

Initial

Last name

Social Security Number

Taxpayer

Spouse

Street Address

Apt. Number

City

State

Zip Code

County

Foreign Country/Province

Taxpayer Telephone

Home

Business

Fax

Spouse Telephone

E-Mail Address

X if you want your tax return mailed to a different address. (Provide details on a continuation sheet.)

X if you authorize taxing authority to discuss return with paid preparer..... Federal. . . State. . .

Filing Status - Form 1040 - U.S. Citizen or Resident Alien

Indicate **X** for marital status at 12/31:

Single.....

Married, filing jointly.....

Married, filing separately.....

Head of household (Unmarried and providing more than half the cost of a home for a dependent or unmarried child).....

Widow (widower), as of 2021 or later, who maintained a home as the principal place of residence for a dependent child, stepchild, adopted child or foster child.....

If nonresident alien spouse, check here.....

Head of Household

Indicate the name of the qualifying child who is not a dependent.....

Social security number of qualifying child.....

General

Taxpayer

Spouse

Occupation.....

Date of birth..... / /

Disabilities..... Blind ___ Deaf ___ Other ___

Contribute to Presidential Campaign Fund..... Yes ___ No ___

Date of death..... / /

Information for Direct Deposit of Refund (attach a voided check)

Routing number (should be 9 digits). Note if you would like to direct your refund into more than one

Account number account (3 max), provide information on continuation sheet.

Account type: Refunds will be deposited into your checking account. For savings account deposit mark..

Driver's License Information

Taxpayer

Spouse

State of Issuance.....

Driver's License Number.....

Issuance Date..... / /

Expiration Date..... / /

Dependent Information

Dependents

In general, individuals may not be claimed as a dependent, unless:

- 1) they were a U.S. citizen or a U.S. legal resident, **and**
- 2) you provided over half of their total support in 2023, **and**
- 3) they had gross income of less than \$4,700 and was your qualifying relative, **or**, the individual was your child **and**
 - a. Your child was under age 19 at the end of 2023, **or**
 - b. Your child was under age 24 at the end of 2023 **and** was a student for any 5 months.

A= Indicate: **T**=Taxpayer, **S**=Spouse, **J**-Joint C= No. of months lived in your home in 2023, or B=born, D=died
 B= Dependency relationship (child, grandchild, etc.) D= Child care expenses incurred & paid in 2023 (prior to age 13)

A	First Name	Last Name	Soc Sec No.	Date of Birth	B	C	D

Miscellaneous Information

Indicate: **X** if child can be claimed as a dependent on another's return _____

Computation of Tax for Children and/or Dependents

Attach any W2s reporting wages earned by your children and/or dependents.

Attach any 1099s received by your children and/or dependents.

Make a note of any taxable income received by your children and/or dependents where 1099s were not issued.

If your children and/or dependents filed a 2022 tax return, please provide a copy (if not already provided).

INCOME

Attach the following forms and information as applicable

1	W-2s
2	1099s for Dividends, Interest, and Sales Note: If any sales are reported, we will need dates purchased and cost basis
3	1099s for Social Security, Retirement Distributions, State Refunds, Misc. Income, Gambling Winnings, Distributions from Qualified Education Programs, etc. Please also make note of any taxable income where 1099s were not received, such as alimony.
4	Business income and expenses (attach summary)
5	Rental income and expenses (attach summary)
6	Schedule K-1s from partnerships, estates and trusts, or S corporations
7	Copy of 2022 Federal and State Income Tax Returns (if not already provided)
8	Return signed Engagement Letter

ADJUSTMENTS TO INCOME

9	Traditional IRA Contributions for 2023 (must be made by April 15, 2024):		
	Check if you want us <u>to calculate maximum allowable</u>	Actual Amount <u>you contributed</u>	
	Taxpayer: _____	_____	
	Spouse: _____	_____	
10	Roth IRA Contributions for 2023 (must be made by April 15, 2024):		
	Check if you want us <u>to calculate maximum allowable</u>	Actual Amount <u>you contributed</u>	
	Taxpayer: _____	_____	
	Spouse: _____	_____	
11	SEP/Simple, Etc., Plan Contributions (must be made by extended due date of Tax Return):		
	Check if you want us <u>to calculate maximum allowable</u>	Actual Amount <u>you contributed</u>	
	_____	_____	

ADJUSTMENTS TO INCOME (continued)

12	Tuition for College Education (attach Form 1098-T): For Whom: _____ Amount: _____ For Whom: _____ Amount: _____
13	Alimony paid/received: \$ _____ Recipient's Soc. Security No.: _____ (Alimony taxable/deductible only for pre-2019 divorce settlements, i.e. prior to the repeal of alimony rules.)
14	Student Loan Interest Paid: \$ _____ (attach Form 1098-E)
15	Penalty for Early Withdrawal of Saving: \$ _____
16	Teacher's Unreimbursed Classroom Expenses (max. \$300 per spouse/teacher): \$ _____

Miscellaneous Questions

If we do not have copies of your Federal and State income tax returns for 2022 please include them with this Organizer.

Indicate **X** if:

1. You would like to have any overpayment of federal/state tax applied to your 2024 estimated tax..... _____
2. During 2023, you received any notices or settled any examinations concerning your prior years' Federal, State, Local, or Foreign tax returns. If so, attach copies of notices..... _____
3. You or your spouse made any gifts (not charitable contributions) in excess of \$17,000 to any one donee during the year. If so, provide details on a continuation sheet..... _____
4. You or your spouse made any gifts in trust for any amount..... _____
If so, provide a copy of the trust instrument and provide details on a continuation sheet.
5. You received grants of stock options from your employer or disposed of any stock acquired under a qualified employee stock purchase plan..... _____
If so, provide details on a continuation sheet and copies of documentation.
6. You exercised any stock options during 2023. If so, provide details on a continuation sheet..... _____
7. You disposed of any corporate bonds for which you paid other than the principal amount (i.e., discount or premium). If so, provide details on a continuation sheet..... _____
8. You loaned money for an interest rate less than the market rate of interest..... _____
If so, provide details on a continuation sheet.
9. You received any payments from a pension or profit-sharing plan this year or expect to receive next year..... _____
If so, provide details on a continuation sheet and attach statements from the plan.
10. You received a Form 1099-DIV that includes dividends you received as a nominee; that is, in your name, but the dividends actually belong to someone else. If so, please provide details... _____
11. You had income from rental property that is not listed elsewhere in this organizer..... _____
If so, please provide details of income, expenses, and the acquisition dates and cost of the property and any equipment, furniture, fixtures, and appliances.
12. In 2023, you purchased a new alternative-powered vehicle (e.g. hybrid-fuel, electric) that was not intended for resale. If so, please provide details..... _____
13. You had a foreign bank account, securities account or signature authority over such an account at any time during 2023. If so, provide details on a continuation sheet..... _____
14. You paid household employee wages of \$2,600 or more or withheld federal income tax in 2023. If so, provide details on the continuation sheet..... _____

Miscellaneous Questions (continued)

15. You sold your primary and/or secondary residence in 2023. If so, please attach copies of closing statements from the original purchase and from the sale..... _____
16. You purchased a primary and/or secondary residence in 2023. If so, please attach copies of closing statements from the purchase..... _____
17. You refinanced a mortgage during 2023. If so, please attach copies of the closing statement and terms of the new mortgage..... _____
18. You made energy efficiency improvements to a home. If so, please provide details..... _____
19. You incurred any non-business bad debts..... _____
If so, provide the following details on a continuation sheet:
- A description of the debt, including the amount and the date it became due,
 - The name of the debtor, and any business or family relationship between you and the debtor,
 - The efforts you made to collect the debt, and
 - Why you decided the debt was worthless
20. You have written substantiation for all business expenses..... _____
You should keep the following in a safe place:
- Date, place, and amount of expense
 - Actual receipts for expenses in excess of \$75
 - Name and business affiliation of persons involved
 - Business purpose of expense
 - Documentation of the business discussed
 - Receipts for hotel, airline, and other travel expense
21. You paid mortgage interest on a loan where the proceeds were not used to buy, build or improve your new home..... _____
22. You received a corrective distribution from a deferred compensation plan such as a 401(k) plan. If so, please provide related documents and details..... _____
23. If you received compensation (either in the form of wages, payment for services, or from ‘mining’) in the form of Virtual/Crypto Currency during 2023 provide detail on continuation sheet..... _____
24. If you sold or exchanged Virtual/Crypto Currency during 2023, provide detail of fair market value and basis information of Virtual/Crypto Currency on continuation sheet..... _____
25. During 2023, did you make payments or pay wages using Virtual/Crypto Currency to an independent contractor, employee or other service provider? If yes, provide details on continuation sheet..... _____

