

2023 Income Tax Organizer

[illegible]

<input type="checkbox"/> Marriage Divorce/Separation <input type="checkbox"/> Retirement (IRA, 401K) withdrawals <input type="checkbox"/> Own or started a business	<input type="checkbox"/> Adoption <input type="checkbox"/> Purchased a home <input type="checkbox"/> Sold stock	<input type="checkbox"/> Own rental property <input type="checkbox"/> Made home energy efficient improvements <input type="checkbox"/> Foreign earned income	
Virtual Currency			
At any time during 2023, did you buy, sell, send, or exchange any virtual currency? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Income - Please provide applicable Forms W2 and 1099			
Interest Income: Form 1099-INT or Dividend Income: Form 1099-DIV	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Sale of Stock or Bonds- please include <u>complete</u> purchase and sale information: Form 1099-B	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Retirement Plan Income: Form 1099-R	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Unemployment Compensation: Form 1099-G	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Social Security Benefits: Form SSA-1099 or RRB-1099	<input type="checkbox"/> Yes <input type="checkbox"/> No		
State or Local Refund Received: Form 1099-G, Itemized on your 2021 return? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No		
K-1 from a Corporation, Estate, Trust, Partnership, etc.?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Collection of Debt: 1099-C	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Gambling Winnings! Form W2-G	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Business Income: 1099-MISC. Please provide 1099-MISC and complete schedule "C" to the best of your ability. We will contact you for further information and details of your business expenses.	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Royalty Income: 1099-MISC.	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Rental Income: Please attach Schedule "E" (available on our website) with preliminary notes for us to work with. We will contact you for further information.	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Estimated or Quarterly Tax Payments paid in 2023 <input type="checkbox"/> Yes <input type="checkbox"/> No <i>(made directly to the IRS usually for self-employment/investment income, not from your W2) \$</i>			
Alimony Paid			
Date of original divorce/separation agreement _____ Alimony Paid \$ _____ Recipient's Name: _____ SSN: _____			
IRA Contributions			
Taxpayer	\$ _____	<input type="checkbox"/> Roth <input type="checkbox"/> Traditional	
Spouse	\$ _____	<input type="checkbox"/> Roth <input type="checkbox"/> Traditional	
Educational Deductions & Student Loan Interest			
<input type="checkbox"/> Student Loan Interest Paid- <i>Please provide Form 1098-E</i> <input type="checkbox"/> Tuition Paid- <i>Please provide Form 1098-T</i>			
	Name	Name	Name
Years in College	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad
Was student at least halftime?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Medical Expenses & Accounts			
Health Savings Accounts (HSA) Forms 5498-SA or 1099-SA Please provide forms			
HSA Coverage <input type="checkbox"/> Self Only <input type="checkbox"/> Family			
Please provide Health Insurance Coverage 1095-A if you have coverage via the Marketplace			

Medical Expenses <i>Medical Expenses must exceed 7.5% of your income. Do not include amounts paid by insurance or with pre-tax dollars</i>						
Medical miles driven:			Optometry Contacts and Glasses: \$			
Doctors, Dentist, & Hospitals: \$			Prescription Medicine: \$			
Health Care Tax Credit <input type="checkbox"/> Yes <input type="checkbox"/> No Please provide Form 8885 or 1099-H if eligible						
Moving Expenses for Active-Duty Military ONLY						
Date of Move:			<i>*Move must be of primary residence more than 50 miles and job related*</i>			
Miles from new home to job:			Miles from old home to job:			
Miles Driven:			Lodging Expenses: \$			
Moving Supplies & Rentals: \$			Reimbursement <input type="checkbox"/> YES <input type="checkbox"/> NO			
Home Ownership (provide 1098-Mort forms)						
Mortgage Interest:			Property Taxes:			
Points Paid:			PMI Insurance:			
Sales Tax						
<i>*The IRS allows a preset amount be included based on your income, however your number might be higher especially if it was a year of big purchases</i>						
Sales tax paid on a car, boat, RV, or aircraft in 2023: \$						
Total sales tax paid on ALL purchases in 2023: \$			<i>Optional</i>			
Charitable Contributions						
<i>* Regardless of the amount, to deduct a contribution of cash, check, or other monetary gift, you must maintain a bank/ payroll deduction record or a written communication from the organization. Containing the name of the organization, the date and amount of the contribution. Please provide receipts.</i>						
Cash Contribution Amount: \$			Charitable miles driven:			
Non-Cash Contribution Amount: \$			<i>goodwill, purple heart, or salvation army it all counts!</i>			
Casualty Theft & Loss						
Type Of Property	Reason for Damage	Date of Event	Date Acquired	Value before loss or damage	Value after loss or Damage	Insurance Reimbursement
Miscellaneous Expenses						
Safety deposit box rental: \$			Educator Expenses: \$			
Margin or Investment interest paid/Fees: \$			Personal property taxes: \$			
Tax preparation Fees: \$			Tax preparation books or software: \$			
Unreimbursed Employee Expenses						
Eliminated for tax years 2018 through 2025 due to FEDERAL tax reform. Employee deductions are still available for AL, AR, CA, HI, MN, NY, and PA. Talk to us about what is deductible.						

Child Care Expenses

Dependent Care Benefits through employer: ☐ Yes ☐ No

**Child must be under the age of 13, exception applies for qualifying adult.*

Provider	Address	Tax ID or SS#	Childs Name	Amount

Energy Efficient Improvements

**You may be able to take a credit of up to 30% of your costs of qualified solar electric property, solar water heating property, small wind energy property, geothermal heat pump property, and fuel cell property. Include any labor costs properly allocable to the onsite preparation, assembly, or original installation of the residential energy efficient property and for piping or wiring to interconnect such property to the home.*

Energy Efficient Improvements ☐ Yes ☐ No Please Explain:

Filing Instructions

Would you like to electronically file your return?

☐ Yes, It's FREE, safe, and the quickest way to receive your refund

☐ No, *\$20 additional fee* Sign and date your paper return upon arrival and mail to the appropriate agencies.

Would you like direct deposit?

☐ Yes, It's FAST & FREE!!!

Bank Name: _____ ☐ Checking ☐ Savings

Routing Number#: _____ Account #: _____

☐ If no, your refund will be mailed to your filing address in approximately 3-6 weeks after it has been accepted.

Additional Comments: