

2023 Individual Taxpayer Organizer

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Taxpayer				Tax ID #*	
First Name	M.I.	Last Name	Email	IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No		
Address		City	State	Zip	
County	Primary phone		Secondary phone		
Driver's License No.	State	Issue Date	Exp. Date		

Spouse				Tax ID #*	
First Name	M.I.	Last Name	Email	IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No		
Address <small>(if different from Taxpayer)</small>		City	State	Zip	
County	Primary phone		Secondary phone		
Driver's License No.	State	Issue Date	Exp. Date		

If you moved during 2023, enter your previous address.	Date of move
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Marital status on 12/31/23: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
 Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
 Notices: Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children Child's full name	Tax ID #*	IP PIN	Date of birth	Months lived in home in 2023	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,250 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Other dependents or people who lived with you						
Name	Tax ID #*	IP PIN	Date of birth	Months lived in home in 2023	Relationship	Income

Bank information: Use for	Direct deposit of refund	Direct debit of balance due	Name of bank
Checking	Savings	Routing transit number	Account number

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

*A Tax ID # is either a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—ask your preparer if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Did you pay or receive alimony in 2023? <i>Paid Received \$</i>	<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?		
	Yes	No	Did you purchase a new or used energy-efficient, hybrid, or electric car, truck, or van?		
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Yes	No	Are you a member of the military?	State of residency	
	Yes	No	Were you a citizen of or lived in a foreign country?	Foreign country	
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? <i>Maximum value \$</i>		
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name</i>	<i>Phone number</i>	<i>PIN (any five digits)</i>
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2023? (Provide statement for other expenses.)		
	Yes	No	Were any children attending college? (Provide Form 1098-T and Form 1098-E.)		
			<i>Year in college</i>	<i>Paid by you: Tuition \$</i>	<i>Books \$</i>
			<i>Paid by student: Tuition \$</i>	<i>Books \$</i>	<i>Student loan interest \$</i>
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?		
			<i>Student</i>	<i>Amount paid \$</i>	
			<i>Name and address of school</i>		
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)		
			<i>Name of provider</i>	<i>EIN or SSN</i>	
			<i>Address</i>	<i>Amount paid \$</i>	
Yes	No	Do you have any children who have unearned income of \$1,250 or more?			
Yes	No	Did you make any contributions to a 529 plan in 2023?			
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2023?	Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2023?		
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?		
	Yes	No	Did you receive any income from an installment sale?		
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2023?		
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2023?		
	Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (<i>Digital assets include cryptocurrencies, NFTs, and stablecoins</i>)		
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money before April 15, 2024 to an HSA for 2023? If yes, provide details.		
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase in 2023, such as a vehicle, boat, or home?		
	Yes	No	Did you make any charitable contributions in 2023? If yes, provide details.		
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?		
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?		
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.		
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.		
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.		
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.		
State information		Full-year resident	Part-year resident	Nonresident	School district
States of residence during 2023 and dates				Do you rent or own your home?	Rent Own
				<i>Total rent paid \$</i>	Includes heat? Yes No

Estimated Tax Payments — Tax Year 2023

<i>Installment</i>	<i>Date paid</i>	<i>Federal</i>	<i>Date paid</i>	<i>State</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2022 overpayment		\$		\$
Total		\$		\$

Tax Preparation Checklist

Please provide the following documentation:

- All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
- Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- If you are a new client, provide copies of last year's tax returns.
- The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."
- Copy of the closing statement if you bought, sold, or refinanced real estate.
- Mileage amounts for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
- Detail of estimated tax payments made, if any.
- Income and deductions categorized on a separate sheet for business or rental activities.
- List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made in 2023.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.