ORGANIZER

2023	1040	US	Tax Organizer

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Tax Return Appointment

Date: Time: Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please enter all pertinent 2023 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

or social services agency of	i program statement.		
CLIENT INFORMA	TION	Taxpayer	Spouse
First name and initial			- Spanis
Last name			
Title/suffix			
Social security number			
Occupation			
Date of birth (m/d/y)			
Date of death (m/d/y)			
1=blind			
Home phone			
Work phone			
Work extension			
Cell phone			
E-mail address			
	In care of		
	Street address		
Address	Apartment number.		
Audress	City		
	State		
	ZIP code		
DEPENDENTS			
DEPENDENTS		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y)			
Social security number			
Relationship			
Months lived at home			
		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y)			
Social security number			
Relationship			
Months lived at home			

ORGANIZER 2023 1040 US Tax Organizer Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount. WAGES, SALARIES AND TIPS 2023 Amount Employer name: 2022 Amount Attach Forms W-2 INTEREST INCOME Payer name: Attach Forms 1099-INT **DIVIDEND INCOME** Payer name: Attach Forms 1099-DIV PENSIONS, IRA AND GAMBLING INCOME Payer name: Attach Forms 1099-R & W-2G Winnings not reported on W-2G..... Total gambling losses..... OTHER GOVERNMENT FORMS - INCOME Form 1099-B - Sales of stock (also include transaction history) Attach Forms 1099 Form 1099-K - Merchant card and third party network payments Form 1099-S - Sales of real estate (also include closing statements) . Attach Forms 1099 Taxpayer: Attach Forms 1099 Form 1099-Q (529 Plan) Form 1099-QA/5498-QA (ABLE Accounts) Spouse: Attach Forms 1099 Form 1099-Q (529 Plan) Form 1099-QA/5498-QA (ABLE Accounts)

23	1040	US	Tax Organizer		
MISCE	LLANEOU	S INCOME			
	Taxpayer: Ali	mony received			
	Spouse: Alim	ony received			
Other:					
DETID	SEARNIT D		TOIDLITIONS		
			TRIBUTIONS	2023 Amount	2022 Amount
Taxpaye			utions (1=maximum)		
			s (1=maximum)		
Casusa			, & qualified plan contributions (1=maximum)		
Spouse:			utions (1=maximum)		
			· · · · · · · · · · · · · · · · · · ·		
	Sen-employ	eu, sep, siiviple	, & qualified plan contributions (1=maximum)		
OTHE	R GOVER	NMENT F	ORMS - DEDUCTIONS		
Forn	m 1098-E - S	Student Ioan i	nterest	Attach Forms 1098	
Forr	m 1098-T - T	uition and re	lated expenses	Attach Forms 1098	
	RDABLE C			Attach Forms 1095	
Forn	n 1095-A - He	ealth Insuranc	e Marketplace Statement	Allach Forms 1095	
ADJU:	STMENTS	TO INCO	ME		
Taxpaye					
		ealth insurar	ce premiums		
Edu	cator expens	ses			
Othe	er adjustmen	its to income	:		
Alim	nony paid - R	Recipient nan	ne & SSN		
-					
Spouse:					
Self	-employed h	ealth insurar	ce premiums		
Edu	cator expens	ses			
Othe	er adjustmen	its to income	:		
0.11		N ! - ! !	a con		
Allm	nony paid - R	recipient nan	ne & SSN		
MEDIC	CAL AND	DENTAL E	EXPENSES		
Prescrip	otion medicin	es and drugs	5		
		•			
			ayer		
			se		
			ortation expenses		
Other:				+	
			l		
TAXES	S PAID				
State in	come taxes	- 1/23 payme	ent on 2022 state estimate		

TAX	ES PAID (c	ontinued)		2023 Amount	2022 Amount
State i	income taxes -	paid with 202	2 state extension		
State i	income taxes -	paid with 202	2 state return		
State i	income taxes -	paid for prior	years and/or to other states		
City/lo	cal income tax	es - 1/23 payr	ment on 2022 city/local estimate		
City/lo	ocal income tax	xes - paid wit	th 2022 city/local extension		
City/lo	ocal income tax	xes - paid wit	th 2022 city/local return		
State	and local sale	s taxes (exce	ept autos and special items)		
Use ta	axes paid on 2	023 purchase	es		
Use ta	axes paid on 2	022 state reti	urn		
Sales	tax on autos r	not included a	above		
Sales	taxes paid on	boats, aircra	ft, and other special items		
Real e	estate taxes - p	orincipal resid	dence		
Real e	estate taxes - ı	oroperty held	for investment		
Pe		ty taxes (incl	uding automobile fees in some states)	Attach Tax Notice	
Home	mortgage inte	erest and poir	nts paid:		
\square _				Attach Forms 1098	
\sqcup				71110111101111011010	
Home m	nortgage interest n	ot on Form 1098	(include name, SSN, & address of payee):		
Points	s not reported	on Form 1098	8:		
iiivest	ment interest	(interest on n	nargin accounts):		
_					
Passiv			nargin accounts):		
Passiv CAS	ve interest H CONTRIE : No deduction	BUTIONS n is allowed for			
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