



2023 Individual Taxpayer Organizer

Our office is currently offering the following services:

1. Drop-Off Services
2. Secure Portal upload through Intuit Link
3. Virtual Tax appointments through Microsoft Teams
4. In- Office Appointment following CDC guidelines

Taxpayer				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email		IP PIN
Occupation		Date of birth		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Home phone		Work or cell	
Driver's License	No.	State	Issue Date	Exp. Date	

Spouse				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	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		Home phone		Work or cell	
Driver's License	No.	State	Issue Date	Exp. Date	
Marital status at 12/31/2023: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure					
Were you divorced or separated during the year? Yes No			Were there any deaths in the family? Yes No		
Have you received any notice from the IRS or state revenue department within the past year? Yes No					

Names of dependent children <small>Child's full name</small>	Social Security #	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 \$1,300 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	Social Security #	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
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Please provide medical expenses only if they will exceed 7.5% of your income.

Questions — All Taxpayers

(Provide related statements or other documentation.)

“You” refers to both taxpayer and spouse — enter “?” if unsure about a question.

L	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?			
	Yes	No	Did you pay anyone for domestic services in your home?			
	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		
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2023? (Provide statement for other expenses.)			
	Yes	No	Were any children attending college? <i>Year in college</i>	Paid by you: <i>Tuition \$</i>	<i>Student loan interest \$</i>	
				Paid by student: <i>Tuition \$</i>	<i>Books \$</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? (add statement if needed)			
			<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 \$1,300 or more?			
Yes	No	Did you make any contributions to a 529 plan in 2023? If yes, provide details and the amount.				
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 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 receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?			
	Yes	No	Did you pay any interest on a loan for a home, boat or RV that has living quarters? If yes, provide Form 1098			
	Yes	No	Did you pay sales taxes on a major purchase in 2023, such as a vehicle, boat, or home? Form 1098			
	Yes	No	Did you make any charitable contributions in 2023? If yes, provide details and amount; note whether cash or noncash			
	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 and Form 1098		
		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 and Form 1098			
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.			
Income	Yes	No	Please provide all of your 2023 Form W-2s — Wage and Tax Statements			
	Yes	No	Please provide all of your 2023 Form 1099-INT — Interest Income			
	Yes	No	Please provide all of your 2023 Form 1099-DIV — Dividends and Distributions			
	Yes	No	Please provide all of your 2023 Form 1099-R — Distribution from Pension, Annuities, Retirement or IRAs			
	Yes	No	Please provide all of your 2023 Income for Sale of Stock (1099B), Real Estate (1099S)			
	Yes	No	Please provide all of your 2023 Forms for Unemployment Compensation/ State Tax Refund (1099G), Social Security (SSA-1099), Unreported Tips, Business Income or Rental Income (1099Misc)			

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