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## **2023 TAX ORGANIZER**

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**I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.**

<b>Taxpayer Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>



# Personal Information

### Taxpayer:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification

### Spouse:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification

### Contact Information:

Street Address \_\_\_\_\_ Apartment Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP or Postal Code \_\_\_\_\_

Foreign Province or County \_\_\_\_\_

Foreign Country \_\_\_\_\_

Taxpayer Daytime/Work Phone \_\_\_\_\_ Taxpayer Evening/Home Phone \_\_\_\_\_ Taxpayer Foreign Phone \_\_\_\_\_

Taxpayer Cell Phone \_\_\_\_\_ Taxpayer Fax Number \_\_\_\_\_

Spouse Daytime/Work Phone \_\_\_\_\_ Spouse Evening/Home Phone \_\_\_\_\_ Spouse Foreign Phone \_\_\_\_\_

Spouse Cell Phone \_\_\_\_\_ Spouse Fax Number \_\_\_\_\_

Taxpayer Email Address \_\_\_\_\_

Spouse Email Address \_\_\_\_\_

Preferred Method of Contact \_\_\_\_\_

May the IRS or other taxing authority discuss the return with the preparer?  Yes  No

Is the taxpayer claimed as a dependent on someone else's tax return?  Yes  No

Are you considered legally blind per IRS regulations?  Yes  No

Do you want to contribute to the Presidential Election Campaign Fund?  Yes  No

Are you a U.S. citizen or Green Card holder?  Yes  No

**Personal Identification Numbers:** Code - 1 - Issued by IRS 2 - Issued by State or City

The IRS has recommended that taxpayers have an Identity Protection (IP) PIN to increase filing security. If you would like an IP PIN for yourself, your spouse, or your dependents or have one but do not know the IP PIN assigned, visit [IRS.gov](https://www.irs.gov) to retrieve it or apply.

TS	State	City	Code	PIN

### Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.

## Questions (Page 1 of 5)

The following questions pertain to the 2022 tax year. For any question answered Yes, include supporting detail or documents.

**Please do NOT send any documents as a photo (JPEG, PNG). Any documents sent electronically need to be sent as a PDF. Supporting and other Tax Documents can also be dropped off or mailed to our office.**

### Personal Information:

Yes No

Did your marital status change? \_\_\_\_\_

Are you married? \_\_\_\_\_

If No, are you in a domestic partnership, civil union, or other state-defined relationship? \_\_\_\_\_

Did you or your spouse serve in the military or were you or your spouse on active duty? \_\_\_\_\_

Did you or your spouse receive unemployment compensation?  
If Yes, include your 1099G(s) \_\_\_\_\_

Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns? \_\_\_\_\_

Is the bank account on record for your 2022 taxes the same account that should be used for 2023? \_\_\_\_\_

If Not Please Provide:

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Did you or your spouse receive an Identity Protection PIN from the IRS for 2023? \_\_\_\_\_

If Yes, attach letter with PIN

Do you or your spouse want \$3.00 contributed to the Presidential Election Campaign Fund?  
Taxpayer \_\_\_\_\_  
Spouse \_\_\_\_\_

### Dependents:

Were there any changes in dependents from the prior year? \_\_\_\_\_

Note: Include non-child dependents for whom you provided more than half the support.

Did you or your spouse pay for child care while you or your spouse worked or looked for work? \_\_\_\_\_

Do you have any children under age 18 with unearned income more than \$1,250? \_\_\_\_\_

Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than \$1,250? \_\_\_\_\_

Did you adopt a child or begin adoption proceedings? \_\_\_\_\_

## Questions (Page 2 of 5)

### Personal Residence:

Yes No

Did your address change?

\_\_\_\_\_

If Yes, provide the new address. \_\_\_\_\_

If Yes, did you move to a different home because of a change in the location of your job?

\_\_\_\_\_

Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?

\_\_\_\_\_

Are your total mortgages on your first and/or second residence greater than \$750,000?

\_\_\_\_\_

If Yes, provide the principal balance and interest rate at the beginning and end of the year.

Did you or your spouse take out a home equity loan during 2023?

\_\_\_\_\_

If Yes, were all of the proceeds used to renovate or improve the home?

\_\_\_\_\_

Did you or your spouse have an outstanding home equity loan at the end of the year?

\_\_\_\_\_

If Yes, provide the principal balance and interest rate at the beginning and end of the year.

BOY \$ \_\_\_\_\_ % \_\_\_\_\_ EOY \$ \_\_\_\_\_ % \_\_\_\_\_

Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?

\_\_\_\_\_

### Deductions and Credits:

Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization?

\_\_\_\_\_

If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of \$10,000 or less.

Did you or your spouse incur any casualty or theft losses?

\_\_\_\_\_

If Yes, were the losses attributable to a federally declared disaster?

\_\_\_\_\_

Did you or your spouse make any large purchases, such as motor vehicles and boats?

\_\_\_\_\_

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?

\_\_\_\_\_

Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?

\_\_\_\_\_

Did you or your spouse install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?

\_\_\_\_\_

## Questions (Page 3 of 5)

### Gifts:

Yes No

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of \$17,000 to any individual?

\_\_\_\_\_

Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?

\_\_\_\_\_

Did you or your spouse make any gifts to a trust for any amount?

\_\_\_\_\_

Did you or your spouse have a life insurance trust?

\_\_\_\_\_

Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?

\_\_\_\_\_

Did you or your spouse forgive any indebtedness to any individual, trust or entity?

\_\_\_\_\_

### Investments:

Did you or your spouse have any debts canceled, forgiven or refinanced?

\_\_\_\_\_

Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?

\_\_\_\_\_

Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?

\_\_\_\_\_

Did you or your spouse sell, exchange, or purchase any real estate?

\_\_\_\_\_

If Yes, include closing statements.

Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?

\_\_\_\_\_

Did you or your spouse engage in any put or call transactions?

\_\_\_\_\_

If Yes, provide the transaction details.

Did you or your spouse close any open short sales?

\_\_\_\_\_

Did you or your spouse sell any securities not reported on Form 1099-B?

\_\_\_\_\_

In 2023 did you or your spouse engage in any virtual currency transactions such as (a) receive (as a reward, award, or compensation) or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

\_\_\_\_\_

### Retirement or Severance:

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?

\_\_\_\_\_

Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?

\_\_\_\_\_

## Questions (Page 4 of 5)

**Yes No**

Did you or your spouse make a qualified charitable contribution from an IRA? \_\_\_\_\_

If you or your spouse are over 72 and have money in an IRA or other retirement account, did you take an RMD? \_\_\_\_\_

Did you or your spouse retire or change jobs? \_\_\_\_\_

### Sale of Your Home:

Did you sell your home? \_\_\_\_\_

Did you receive Form 1099-S? \_\_\_\_\_

If Yes, include Form 1099-S.

Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale? \_\_\_\_\_

Did you or your spouse ever rent out the property? \_\_\_\_\_

Did you or your spouse ever use any portion of the home for business purposes? \_\_\_\_\_

Have you or your spouse sold a principal residence within the last two years? \_\_\_\_\_

At the time of the sale, the residence was owned by the:

\_\_\_\_\_ Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_ Both

### Healthcare:

Did you obtain healthcare coverage through the Marketplace? \_\_\_\_\_

If Yes, include all Forms 1095-A.

If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment? \_\_\_\_\_

Did you receive Form 1095-A for someone claimed as a dependent on another taxpayer's return or for any dependent who is required to file their own return? \_\_\_\_\_

Were you eligible for employer-sponsored healthcare coverage? \_\_\_\_\_

Did you or your spouse have any transactions pertaining to a health savings account (HSA)? \_\_\_\_\_

If you received a distribution from an HSA, include all Forms 1099-SA.

If you received a distribution from an HSA, were all of the proceeds used for qualified medical expenses? \_\_\_\_\_

Did you or your spouse receive any distributions from long-term care insurance contracts? \_\_\_\_\_

If Yes, include Forms 1099-LTC.

## Questions (Page 5 of 5)

**Yes No**

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan or long-term care plan at another job?

\_\_\_\_\_

If Yes, how many months were you covered? Health \_\_\_\_\_ LTC \_\_\_\_\_

Did you or your spouse lose your job because of foreign competition and pay for your own health insurance?

\_\_\_\_\_

### Education:

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition?

\_\_\_\_\_

Did you or your spouse pay any student loan interest?

\_\_\_\_\_

Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?

\_\_\_\_\_

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan?

\_\_\_\_\_

If Yes, include all Forms 1099-Q.

If Yes, were the amounts withdrawn used for qualified education expenses?

\_\_\_\_\_

### Foreign Matters:

Did you or your spouse own any foreign financial assets?

\_\_\_\_\_

Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?

\_\_\_\_\_

Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?

\_\_\_\_\_

Did you or your spouse create or transfer money or property to a foreign trust?

\_\_\_\_\_

### Miscellaneous:

Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,600 during the year for domestic services performed in or around your home to individuals who could be considered household employees?

\_\_\_\_\_

If Yes, include the name, address and social security number of the person(s)

Have you or your spouse received any damage award from a legal proceeding?

\_\_\_\_\_

Did you or your spouse engage in any bartering transactions?

\_\_\_\_\_

Did you own an interest in an LLC or similar entity that may have a reporting obligation under Corporate Transparency Act?

\_\_\_\_\_

For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?

\_\_\_\_\_