

## 2023 Tax Organizer

- Where you see this symbol, please be sure to send the documents along with the organizer.
- Please include a copy of the signed *Service Engagement Letter*.

**\*\*Did you buy, sell, exchange or otherwise acquire any financial interest in virtual currency or digital asset, such as bitcoin?** \_\_\_\_\_

### Taxpayer

Full Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Legally blind: \_\_\_\_\_  
Home/cell phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_  
Work phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_  
E-mail: \_\_\_\_\_

- For new clients, please send copies of social security cards and driver's licenses or state ID cards for both the taxpayer and spouse.

### Spouse

Full Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Legally blind: \_\_\_\_\_  
Home/cell phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_  
Work phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_  
E-mail: \_\_\_\_\_

### General Information

Complete Address: \_\_\_\_\_  
County name: \_\_\_\_\_ School district: \_\_\_\_\_  
Resident state: \_\_\_\_\_ Non-resident state: \_\_\_\_\_

Marital status: Married    Single    Divorced    Separated    Widowed

- If you are claiming an exemption for a child from a previous marriage, please enclose the pages from your divorce decree that states who is legally able to claim the child, along with the title page and the signature page.

Can you be claimed on anyone else's tax return? \_\_\_\_\_

Are you a US citizen? \_\_\_\_\_ If not, what visa do you have? \_\_\_\_\_

How long have you been in the United States? \_\_\_\_\_

**Dependents**

Name	SS Number	Date of Birth	Relationship	Months in Home during 2023

- Please send copies of social security cards for all dependents unless I have them on file from previous years.

Did you adopt any children during 2023? \_\_\_\_\_

**Income**

- Please list all employers below. Enclose a copy of each W-2, as well as any statements from your employer(s) showing benefits withdrawn from your pay during the year. Also, enclose your final paycheck stub for the year if you have it available.

Employer	Employer

- Please list interest that was paid to you. Be sure to include tax exempt interest. Enclose a copy of each Form 1099-INT.

Interest Payer's Name	Interest Payer's Name

Did you pay any penalties for taking money out of a savings or CD early? \_\_\_\_\_

Do you have any foreign bank accounts? \_\_\_\_\_

Do you have foreign investments worth more than \$10,000 (including pensions)? \_\_\_\_\_

Are you an authorized signer on any foreign account (checking, savings, etc.)? \_\_\_\_\_

- Please list any dividends that were paid to you. Enclose a copy of each Form 1099-DIV.

Dividend Payer's Name	Dividend Payer's Name

- Did you sell any stocks, bonds or other capital assets, including gold, silver or collectibles? \_\_\_\_\_  
Please enclose copies of Form 1099-B and list below.

Capital Assets Sold	Capital Assets Sold

- If capital assets were sold and not reported on Form 1099-B, please include the following information: description, date acquired, date sold, cost when purchased, sale price. If you have questions on this, please contact me.
- Did you itemized deductions last year and receive a state tax refund? \_\_\_\_\_
- Did you receive alimony in 2023? \_\_\_\_\_ If so, what year was your divorce agreement finalized or revised? \_\_\_\_\_ How much did you receive in alimony during 2023? \_\_\_\_\_
- Did you have income from a business in 2023? \_\_\_\_\_ If so, please use the *Self-Employed Tax Sheet*, *MK Tax Sheet*, or *Day Care Tax Sheet* to record your income and expenses. If you received a Form 1099-MISC or 1099-K for your business, please enclose a copy.

Did you sell any assets that were previously used in your business? \_\_\_\_\_ If so, enclose information regarding the sale of them.

- Did you take any money out of an IRA, 401(K) or other pension? \_\_\_\_\_ Did you roll any money over from one plan into another plan? \_\_\_\_\_ Please list below and enclose copies of Form 1099-R.

Payer	Payer

If your RMD from your IRA was taken out, was it given to charity? \_\_\_\_\_

- Did you receive social security benefits? \_\_\_\_\_ If so, please enclose Form 1099-SSA.
- Do you have income from rental property? \_\_\_\_\_ If so, please fill out the *Rental Income Tax Sheet* and enclose.
- Do you have income from K-1's (partnerships, S-corps)? \_\_\_\_\_ Did you receive royalties? \_\_\_\_\_ If so, please enclose copies of statements.

Do you have any farm income? \_\_\_\_\_

- Did you receive unemployment compensation? \_\_\_\_\_ If so, please enclose statement.
- Did you have any debt cancelled last year, including foreclosures and cancelled credit card debt? \_\_\_\_\_ If so, enclose Form 1099-C or 1099-A
- Did you have any income from gambling? \_\_\_\_\_ If so, how much? \_\_\_\_\_ Please enclose statements showing income and losses.
- Do you have income from any other source? \_\_\_\_\_ If so, please enclose information.

**Adjustments**

If you are a full-time teacher, K-12, please write the amount of unreimbursed classroom expenses you had for last year. \_\_\_\_\_

- Did you contribute money to an IRA last year? \_\_\_\_\_ Please list the amount and type of contribution or enclose a statement. (Specify if it's a Roth or Traditional, or send the statement showing the contribution).
- Did you pay student loan interest last year? \_\_\_\_\_ Please enclose statement.

Did you pay alimony last year? \_\_\_\_\_ If so, list the recipient, his/her social security number and how much was paid. What year was the divorce decree finalized or revised? \_\_\_\_\_

**Deductions**

Please list amount of health insurance you paid *out-of-pocket*. \_\_\_\_\_

Was it paid through your flex spending account at work or through a plan set up while you were self-employed? \_\_\_\_\_ Do you have a Health Savings Account (HSA)? \_\_\_\_\_

*Please enclose Form 1095 if you purchased health insurance through the Marketplace.*

List other health expenses:

- Prescriptions: \$ \_\_\_\_\_
- Medicare B and D \$ \_\_\_\_\_
- Dental \$ \_\_\_\_\_
- Eye correction \$ \_\_\_\_\_
- Long term care insurance \$ \_\_\_\_\_
- Other medical and dental \$ \_\_\_\_\_
- Number of miles driven for medical/dental care \_\_\_\_\_

*For all expenses, only count those that were not paid through a flex-spending account or an HSA.*

- Did you pay real estate taxes during 2023? \_\_\_\_\_ Please enclose statement.  
Did you pay state taxes for a prior year during 2023? \_\_\_\_\_ If so, how much? \_\_\_\_\_  
Did you pay any foreign taxes or personal property taxes during 2023? \_\_\_\_\_  
Did you purchase any big-ticket items, such as car, boat, etc. \_\_\_\_\_
- Did you pay mortgage interest? \_\_\_\_\_ Please enclose all Form 1098s. If not reported to you on a Form 1098 (if you paid to an individual), please make a note of how much was paid and to whom it was paid and include their social security number.  
Did you refinance your mortgage during 2023? \_\_\_\_\_  
Did you pay any interest on investments? \_\_\_\_\_

Did you have charitable contributions during 2023? \_\_\_\_\_ If so, please list the amounts below.

- Amount given by check, cash, or credit card \$ \_\_\_\_\_
- Fair market value of "stuff" donated (such as at Goodwill) \$ \_\_\_\_\_
- Other donations, such as stocks \$ \_\_\_\_\_
- Mileage for volunteer work \_\_\_\_\_

Did you have any casualty or theft losses last year? \_\_\_\_\_

Do you have other investment expenses? \_\_\_\_\_ If so, list type and amount.

**Credits**

- Please list any child care expenses for 2023. Enclose statement(s) if available.

Child's name: \_\_\_\_\_ Care provider's name: \_\_\_\_\_

Provider's address: \_\_\_\_\_

Care provider's tax ID number: \_\_\_\_\_ Amount paid: \_\_\_\_\_

Child's name: \_\_\_\_\_ Care provider's name: \_\_\_\_\_

Provider's address: \_\_\_\_\_

Care provider's tax ID number: \_\_\_\_\_ Amount paid: \_\_\_\_\_

- Did you pay tuition and fees for yourself or a dependent? \_\_\_\_\_ If so, please enclose 1098-T from the college.
- If you live in Wisconsin, did you pay tuition for any private school for your dependents? \_\_\_\_\_ If so, how much? \_\_\_\_\_
- Did you make any energy efficient improvements to your home or have an energy audit? If so, please fill out the form on energy credits.

**Miscellaneous**

Did you make any estimated income tax payment for federal or state? \_\_\_\_\_ Please list below.

Please list the amount of rent paid last year. \_\_\_\_\_ Did it include heat? \_\_\_\_\_

Did you receive the home-buyers credit in the past? \_\_\_\_\_ If so, what year? \_\_\_\_\_

**Direct Deposit**

- If you want your refund to be directly deposited into your account, list the information below. If it's a different account from last year, please include a voided check.

Name of bank: \_\_\_\_\_ Please circle: savings or checking

Routing number: \_\_\_\_\_

Account number: \_\_\_\_\_

*The information listed on this form is accurate to the best of my knowledge. (Please sign below).*

\_\_\_\_\_  
*Taxpayer*

\_\_\_\_\_  
*Spouse*