

Tax Organizer

For Tax Year 2023

Name:
 Taxpayer _____ SS No. _____ Birth date/Age _____
 Spouse _____ SS No. _____ Birth date/Age _____
Address: _____ Telephone (Home) (____) _____
 _____ Telephone (Work) (____) _____
 Cell Phone: (____) _____ Cell Phone: (____) _____

Email address (for private communications) _____

Occupation: Taxpayer _____ Spouse _____

Check One: Single Married Filing Joint Surviving Widow/Widower Divorced in 2023
 Married Filing Separately (enter spouse's name/SS No. Above) Unmarried/Head of Household

Did you get married in 2023? _____ **Are you a domestic partner registered in California?** _____

Dependents Name	Birth date/ Age	Social Security Number*										Relationship	Live with you in 2023?	Health insurance coverage?	Tuition Cost Attending College (including books)

*A personal exemption is disallowed for any dependent that does not provide a Social Security number.

HEALTH CARE: Were you covered by a health insurance policy in 2023 (Required for California)?

No Yes, through work or school Yes, through a union retirement plan Yes, through another person
 Over 65, Medicare Yes, State exchange/Covered California/Medical Federal exchange Other _____

If you are **self-employed**, how much were your premiums each month? Amount: \$ _____

FOREIGN ACCOUNTS, BITCOIN, CRYPTOCURRENCIES:

Are you a US Citizen or resident alien and your name is on a foreign bank account, brokerage account, or you are involved in a foreign trust account? Yes No

If yes, did the account have more than \$10,000 (USD) in it at any one time throughout 2023? Yes No

Did you receive gifts or inheritance in excess of \$15,797 from a foreign person? Yes No

Did you buy, sell, or hold cryptocurrencies or Bitcoin in 2023? Yes No

Estimated Tax Payments Made:

	1 st Quarter		2 nd Quarter		3 rd Quarter		4 th Quarter		TOTAL
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	
Federal									
State									
City									

To help you prepare for your coming appointment, we have created the below checklist as a guide for what you should bring with you. If you believe you have any documents that could affect your taxes for 2023, and they are not listed here, please feel free to bring them as well or call our office during normal business hours.

- 1099 Forms for all IRA & Pension Distributions you received during 2023, as well as the amount of contributions you made.
- If you made any state or federal Estimated Tax Payments during 2023, please provide all amounts paid as well as when they were paid.
- All Interest Income and Dividend Income earned in 2023 (Forms 1099-Int and 1099-Div)
- All 1099-SSA forms detailing all Social Security Benefits you received in 2023.
- Any 1099-G forms you received detailing Unemployment Benefits or State refunds you received.
- If you are divorced and are either paying or receiving alimony , please provide the amount you received/paid in 2023.
- Brokerage statements detailing stocks, bonds, and other assets sold during 2023.
- If you sold any of your real estate holdings (home, rental, etc.) please bring a copy of your Closing Escrow Statement.
- If you own properties that you rent out, please bring a summary of income and expenses for each property.
- If you have an interest in an Estate, Trust, Partnership, or S-Corporation, please bring a copy of your schedule K-1.
- If you are self-employed, please bring a summary of all income and expenses for your business as well as any other information (EIN, Home Office information, Business address, etc.)
- If you bought supplies for work (books, markers, pencils, etc.) and were not reimbursed or had other job related expenses (continuing education, dues, subscriptions to journals, etc.), please provide a list with prices.
- If you used your personal vehicle for work, please provide the total miles you traveled during the year, the total number of business miles traveled, and all auto expenses (repair, insurance, lease payments, etc.).
- A list of all Medical Expenses you paid in 2023 and were not reimbursed for (X-rays, Dentists, Prescriptions, Insurance premiums, etc.)
- If you have an outstanding mortgage, please bring a copy of your 1098 Mortgage Statement.
- A copy of all property taxes paid in 2023.
- If you made any donations by cash, or donation (Goodwill, Salvation Army, etc.) please provide a summary and include any letters or receipts you received.
- If you made any improvements on your residence personally, or paid for a contractor, please let us know what work was done and all costs.
- If you paid for tuition please bring the 1098-T from the school (usually found online).