

# PERSONAL INFORMATION ORGANIZER

Please complete this Organizer before your appointment.

## 1. PERSONAL INFORMATION

Name		SSN or ITIN	Date of Birth	Date of Death	Occupation	Blind	Disabled
Taxpayer						<input type="checkbox"/>	<input type="checkbox"/>
Spouse						<input type="checkbox"/>	<input type="checkbox"/>
Street Address		Apt.	City or town	State	Zip Code	County	
Foreign country		Foreign province/state			Foreign postal code		
E-mail Address(es)				Home Phone		Mobile Phone	
Spouse's E-mail Address(es)				Spouse's Mobile Phone			

## 2. FILING STATUS

- Single                       Check if parent (or someone else) can claim you as a dependent on their return.  
 Married Filing Joint  
 Married Filing Separate     Check if you lived apart from your spouse for all of 2023.  
 Head of Household  
 Qualifying Widow(er)      Year spouse died: \_\_\_\_\_

## 3. DEPENDENTS

Name	Relationship	Date of Birth	SSN or ITIN	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income	Child Care Expenses Paid
					<input type="checkbox"/>	<input type="checkbox"/>		
					<input type="checkbox"/>	<input type="checkbox"/>		
					<input type="checkbox"/>	<input type="checkbox"/>		
					<input type="checkbox"/>	<input type="checkbox"/>		
					<input type="checkbox"/>	<input type="checkbox"/>		

## 4. REFUND INFORMATION

1. Would you like to have any refunds directly deposited into your bank account? . . . . .  Yes  No

### Bank Account

Ownership     Taxpayer    Spouse    Joint  
 Type             Checking    Savings  
 Bank name     \_\_\_\_\_  
 Routing number \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Account outside the jurisdiction of the United States?    Yes

### Bank Account

Ownership     Taxpayer    Spouse    Joint  
 Type             Checking    Savings  
 Bank name     \_\_\_\_\_  
 Routing number \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Account outside the jurisdiction of the United States?    Yes

## 5. IDENTIFICATION INFORMATION

### Taxpayer

Type of ID:     Driver's license    State-issued ID  
                    No ID  
 ID number     \_\_\_\_\_  
 Location of issuance \_\_\_\_\_  
 Issue date     \_\_\_\_\_  
 Expiration date \_\_\_\_\_

### Spouse

Type of ID:     Driver's license    State-issued ID  
                    No ID  
 ID number     \_\_\_\_\_  
 Location of issuance \_\_\_\_\_  
 Issue date     \_\_\_\_\_  
 Expiration date \_\_\_\_\_

**PERSONAL INFORMATION ORGANIZER**  
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**6. HEALTH CARE INFORMATION**

Please indicate where you received your health insurance from for all members of your tax household.

- Employer     Government-Sponsored Marketplace     Private Exchange (Individual Insurance Company)

**7. MISCELLANEOUS PERSONAL INFORMATION QUESTIONS**

- |  |                                   |                                 |
|--|-----------------------------------|---------------------------------|
| 1. Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund.  | <input type="checkbox"/> Taxpayer | <input type="checkbox"/> Spouse |
| 2. Were you a victim of identity theft and have you been contacted by the IRS? . . . . .   | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| If Yes, please furnish the 6-digit PIN issued to you by the IRS . . . . .  | _____                             |                                 |
| 3. Were you (or your spouse if filing jointly) a nonresident alien for any part of 2023? . . . . .   | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| 4. Have you received any notices or correspondences from the IRS or state in the past 3 tax years? . . . . .                                   | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| 5. Do you have any children age 18 or under (or student under age 24) who had unearned income of more than \$2,500? . . . . .                  | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| 6. If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return? . . . . . | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| 7. Did you give a gift of more than \$17,000 to one or more people? . . . . .  | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |
| 8. If age 65 or older, do you want to file Form 1040-SR, U.S. Tax Return for Seniors, instead of Form 1040? . . . . .                          | <input type="checkbox"/> Yes      | <input type="checkbox"/> No     |

**8. COMMENTS**

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# INCOME ORGANIZER

Please complete this Organizer before your appointment.  
Business, Farm and Rental and Royalty Income or Loss Organizers are on separate pages.

## 1. WAGE AND SALARY INFORMATION

Attach W-2s:

Employer Name	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

Unreported tip income received: \_\_\_\_\_

## 2. INTEREST AND DIVIDEND INCOME

Attach 1099-INT, 1099-DIV or other statements

Payer Name	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

## 3. RETIREMENT DISTRIBUTIONS

Attach 1099-R & 5498	Roth IRA	Other IRA	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Attach SSA 1099 or RRB 1099

	Yes	No
Did you receive social security benefits? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive railroad retirement benefits? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## 4. SCHEDULE K-1 INCOME (1065, 1120-S AND 1041)

Attach K-1s:

Payer Name	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

## 5. CAPITAL GAINS AND LOSSES

Attach 1099-Bs:

Payer Name	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

## 6. OTHER INCOME

Description	Amount
State income tax refund	_____
Alimony received	_____
Date of original divorce/separation agreement	_____
Unemployment compensation	_____
Gambling winnings	_____
Jury pay	_____
Hobby income	_____
Scholarships (grants)	_____
NOL Carryforward	_____
Child support	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## 7. MISCELLANEOUS INCOME QUESTIONS

1. Did you sell your home? . . . . .  Yes  No
2. Did you earn any foreign income or pay any foreign taxes? . . . . .  Yes  No
3. Do you have a health savings account (HSA), Archer MSA or Medicare Advantage (MA) MSA? . . . . .  Yes  No
4. Did you have a financial account in a foreign country (i.e. bank account, securities account, etc.)? . . . . .  Yes  No  
     If Yes, did the aggregate value of all financial accounts exceed \$10,000 at any time during 2023? . . . . .  Yes  No
5. Did you have any debt forgiven (i.e. student loans, home mortgage, etc.)? . . . . .  Yes  No
6. At any time during 2023, did you:
  - (a) receive (as a reward, award, or compensation)
  - (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? . . . . .  Yes  No

**BUSINESS INCOME AND EXPENSES (Schedule C)**

Indicate the owner of this business:  Taxpayer  Spouse  Joint

Business Name: \_\_\_\_\_

Business product or service: \_\_\_\_\_

Business Address: \_\_\_\_\_

City, State, and Zip Code: \_\_\_\_\_

Did you start or acquire this business during 2023?  Yes  No

Accounting Method:  Cash  Accrual  Other (describe) \_\_\_\_\_

Method used to value inventory:  Cost  Lower of cost or market  Other (describe) \_\_\_\_\_

Income and Cost of Goods Sold	2023 Amount	2022 Amount
Gross receipts or sales . . . . .		
Returns and allowances . . . . .		
Other income (enclose description) . . . . .		
Inventory at beginning of year . . . . .		
Purchases less cost of items withdrawn for personal use . . . . .		
Cost of labor . . . . .		
Materials and supplies . . . . .		
Other costs . . . . .		
Inventory at end of year . . . . .		

Expenses	2023 Amount	2022 Amount		2023 Amount	2022 Amount
Advertising . . . . .			Wages . . . . .		
Commissions and fees . . . . .			Energy efficient commercial bldgs deduction . . . . .		
Contract labor . . . . .			Other: _____		
Depletion . . . . .			_____		
Employee benefits . . . . .			_____		
Insurance (other than health) . . . . .			_____		
Mortgage interest . . . . .			_____		
Other interest . . . . .			_____		
Legal and professional fees . . . . .			_____		
Office expenses . . . . .			_____		
Pension and profit sharing . . . . .			_____		
Rent - Vehicle, machinery . . . . .			_____		
Rent - Other . . . . .			_____		
Repairs and maintenance . . . . .			_____		
Supplies . . . . .			_____		
Taxes and licenses . . . . .			_____		
Travel . . . . .			_____		
Meals and entertainment . . . . .			_____		
Utilities . . . . .			_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2023** (New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales Price

**Business Use of Home**

Area used exclusively for business \_\_\_\_\_ Total area of home \_\_\_\_\_

Was the home used as a day care facility?  Yes  No Date home placed in service \_\_\_\_\_

Casualty losses \_\_\_\_\_ Insurance \_\_\_\_\_ Rent \_\_\_\_\_

Mortgage interest \_\_\_\_\_ Repairs and maintenance \_\_\_\_\_ FMV of home \_\_\_\_\_

Real estate taxes paid \_\_\_\_\_ Utilities and other expenses \_\_\_\_\_ Value of land \_\_\_\_\_

Carryover of unallowed expenses to 2023  Yes  No (if yes, enter amount) \_\_\_\_\_

## DEDUCTIONS ORGANIZER

Please complete this Organizer before your appointment.  
Itemized Deduction Organizers are on separate pages.

### 1. EDUCATION

Attach 1098-Ts, 1098-E's and 1099-Q's:						Student Loan	Books, Supplies			
Student Name	Educational Institution	Fr	So	Jr	Sr	Oth	Tuition & Fees	Interest Paid	& Equipment	529 Plan
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>

### 2. JOB-RELATED MOVING EXPENSES

Description	Amount
Lodging . . . . .	_____
Gas and Oil. . . . .	_____
Mileage . . . . .	_____
Other . . . . .	_____
Miles from old home to your new workplace	_____
Miles from old home to old workplace . . . . .	_____
Member of the Armed Forces? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No

### 3. IRA CONTRIBUTIONS

Description	Amount
Contributions to a Traditional IRA. . . . .	_____
Contributions to a ROTH IRA . . . . .	_____

### 4. OTHER DEDUCTIONS

Description	Amount
Educator expenses. . . . .	_____
Alimony paid Rec. SSN: _____	_____
Date of original divorce/separation _____	
Health Savings Account contributions . . . . .	_____
Archer Medical Savings Account contributions _____	_____
Jury duty repayment to employer . . . . .	_____
Foreign qualified housing expenses. . . . .	_____
Contributions to College 529 Savings Plan. . . . .	_____
Qualified business net (loss) carryover from 2022	_____
Qualified REIT dividends and PTP net (loss) carryover	_____
_____	_____
_____	_____
_____	_____

### 5. MISCELLANEOUS DEDUCTION QUESTIONS

1. Did you purchase an item(s) during 2023 for which you paid a large amount of sales tax? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Did you refinance a mortgage during 2023? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No



**ITEMIZED DEDUCTIONS (continued)**

**Casualty and Theft Losses** (for property damaged by storm, water, fire, accident, or theft)

Enclose supporting documentation of what is written here, i.e. insurance reimbursement, receipts for cost of repairs.

(If additional losses were incurred, please attach a separate sheet of paper with these details.)

Location of property: \_\_\_\_\_ Residential property  Business property   
 Description of property: \_\_\_\_\_ Federal Disaster   
 Date of loss: \_\_\_\_\_ FEMA disaster declaration # \_\_\_\_\_

Amount of damage \_\_\_\_\_ Cost basis of property \_\_\_\_\_ Repair Costs \_\_\_\_\_  
 Insurance reimbursement \_\_\_\_\_ FMV of property before loss \_\_\_\_\_ Other \_\_\_\_\_  
 Federal monies received \_\_\_\_\_ FMV of property after loss \_\_\_\_\_ Other \_\_\_\_\_

**Unreimbursed Employee Business Expenses**

(if any depreciable assets were sold (including the vehicle), please see worksheet below)

Dues (related to job) \_\_\_\_\_  
 Subscriptions related to your work \_\_\_\_\_  
 Licenses and regulatory fees \_\_\_\_\_  
 Tools and supplies used in your work \_\_\_\_\_  
 Work clothes, uniforms if required \_\_\_\_\_  
 Medical exams required by your employer \_\_\_\_\_  
 Work related education (books, tuition) \_\_\_\_\_  
 Legal fees related to your job \_\_\_\_\_  
 Job search expenses (current occupation) \_\_\_\_\_

**Vehicle Information**

Vehicle description \_\_\_\_\_  
 Date placed in service \_\_\_\_\_  
 Cost or basis \_\_\_\_\_

**Miles of vehicle**

Business miles \_\_\_\_\_  
 Commuting miles \_\_\_\_\_  
 Other miles \_\_\_\_\_

**\*In home office:**

Total square footage \_\_\_\_\_  
 Office square footage \_\_\_\_\_  
 Office square footage \_\_\_\_\_  
 Rent . . . . . \_\_\_\_\_  
 Insurance . . . . . \_\_\_\_\_  
 Utilities . . . . . \_\_\_\_\_  
 Repairs/Maintenance \_\_\_\_\_

**Expenses**

Actual expenses \_\_\_\_\_  
 (gas, oil, repairs, etc)  
 Parking fees and tolls \_\_\_\_\_  
 Travel expenses \_\_\_\_\_

\*Questions relating to mortgage interest, taxes, and casualty losses were asked previously

**Sales, Purchases, and Disposition of Assets in 2023**

(New clients, enclose detailed listing of all depreciable assets.)

T S	Asset description	Date acquired	Purchase price	Date sold	Sales price

**Investment Related Expenses**

Tax preparation fees \_\_\_\_\_  
 Safe deposit box \_\_\_\_\_  
 Custodial, trust admin fees \_\_\_\_\_  
 Fees to collect interest and dividends \_\_\_\_\_  
 Tax advice not related to investment income \_\_\_\_\_  
 Legal fees related to producing taxable income \_\_\_\_\_  
 Other \_\_\_\_\_  
 Other \_\_\_\_\_  
 Other \_\_\_\_\_

**Other Misc. Deductions**

Gambling losses . . . . . \_\_\_\_\_  
 Estate tax deduction (in respect of a decedent) \_\_\_\_\_  
 Portfolio from Schedule K-1 \_\_\_\_\_  
 Unrecovered investment in a pension \_\_\_\_\_  
 Amortizable premium on taxable bonds \_\_\_\_\_  
 Disabled persons work expenses \_\_\_\_\_  
 Other \_\_\_\_\_  
 Other \_\_\_\_\_  
 Other \_\_\_\_\_

**CREDITS AND PAYMENTS ORGANIZER**  
Please complete this Organizer before your appointment.

**1. CHILD CARE CREDIT**

Attach Daycare Provider Statement(s):		Tax-Exempt	Telephone Number	Identification Number	Amount Paid
Care Provider Name	Address				
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____

**2. RESIDENTIAL ENERGY CREDIT**

Solar electric property . . . . .	_____	Metal or asphalt roof . . . . .	_____
Solar water heating . . . . .	_____	Exterior windows and skylights . . . . .	_____
Small wind energy . . . . .	_____	Electric heat pump or central air conditioner . . . . .	_____
Geothermal heat pump . . . . .	_____	Natural gas, propane or oil water heater . . . . .	_____
Fuel cell property . . . . .	_____	Biomass fuel stove . . . . .	_____
Insulation material . . . . .	_____	Natural gas, propane or oil furnace . . . . .	_____
Exterior doors . . . . .	_____	Advanced main air circulating fan . . . . .	_____

1. Were the qualified improvements for your main home in the United States? . . . . .  Yes  No

2. Were any of the improvements related to the construction of this main home? . . . . .  Yes  No

**3. MISCELLANEOUS CREDIT QUESTIONS**

1. Did you pay any expenses related to the adoption of an eligible child? . . . . .  Yes  No

2. Are you currently repaying the First-Time Homebuyer Credit? . . . . .  Yes  No

3. Do you (and your spouse) have a social security number that allows you to work and is valid? . . . . .  Yes  No

4. Were you issued a Mortgage Credit Certificate (MCC) by a state or local governmental unit or agency? . . . . .  Yes  No

**4. ESTIMATED TAX PAYMENTS**

Federal estimated payments	Date Paid	Amount Paid	Local estimated payments	Date Paid	Amount Paid
Applied from 2022 federal refund . . . . .	_____	_____	Applied from 2022 local refund . . . . .	_____	_____
1st quarter payment . . . . .	_____	_____	1st quarter payment . . . . .	_____	_____
2nd quarter payment . . . . .	_____	_____	2nd quarter payment . . . . .	_____	_____
3rd quarter payment . . . . .	_____	_____	3rd quarter payment . . . . .	_____	_____
4th quarter payment . . . . .	_____	_____	4th quarter payment . . . . .	_____	_____
State estimated payments	Date Paid	Amount Paid	Locality Name . . . . .	_____	_____
Applied from 2022 state refund . . . . .	_____	_____			
1st quarter payment . . . . .	_____	_____			
2nd quarter payment . . . . .	_____	_____			
3rd quarter payment . . . . .	_____	_____			
4th quarter payment . . . . .	_____	_____			
State Name . . . . .	_____	_____			