

The section to enter your Personal Information and the General Tax Return Questions are now located in the “**CLIENT QUESTIONNAIRE**”. Please complete that document in addition to this Organizer.

COMPLETING THIS ORGANIZER IS OPTIONAL AND MAY ASSIST YOU IN GATHERING YOUR TAX RETURN INFORMATION & DOCUMENTS

INCOME

Indicate if you received any of the following and supply the required documentation:

- Wages – provide Form W-2 for each job
- Social Security Income – provide Form 1099-SSA
- Unemployment Income – provide Form 1099-G
- HSA Distributions – provide Form 1099-SA

- Pension or Annuity Income – provide Form 1099-R for each account
- IRA Income – provide Form 1099-R for each account & year-end IRA statement(s) showing the fair market value on December 31, 2022
- Retirement Plan Transfer or Rollover – provide Form 1099-Rs
- Roth IRA Conversion – provide details and Form 1099Rs

- Interest Income – provide Form 1099-INT for each account
- Dividend Income – provide Form 1099-DIV for each account
- Stock Sale, Digital Assets, or other Investment Property Sales– provide Form 1099-B for each account
- Investment/Brokerage Account – provide *entire copy* of Form 1099 for each account

- Ownership in Partnership, LLC’s, Estate or S-Corporation – provide all Schedule K-1s
- Royalty Income – provide statement or information received
- Rent Income – provide completed Rental Property Organizer or your own schedule/list of income & expense details
- Farm Income – provide completed Farm Organizer or your own schedule/list of income & expense details
- Business Income – provide completed Business Organizer or your own schedule/list of income & expense details

Did you receive any income that you did not receive a tax document for?

Yes No

If yes, please specify and supply additional information, if applicable

Alimony Income

Jury Duty Pay

Other, please list:

Source: _____ Amount: _____

Source: _____ Amount: _____

Source: _____ Amount: _____

EDUCATION EXPENSES AND CREDITS

College Expenses: Please provide Form 1098-T from the educational institution to claim any education credits.

Student Loan Interest Paid: Please provide form 1098

If you or your dependent received distributions from a Section 529 (Edvest) Program, please provide the Form 1099-Q

Were all distributions used to pay for either tuition & fees, room & board or books & other required material? Yes No

If no, please explain:

Section 529 Program (Edvest): If you contributed to a Section 529 Program for yourself or anyone else in 2023, please complete the following:

Beneficiary Name: _____ Amount Contributed: _____

Are you the owner of the Edvest or College Savings Account: Yes No

If no, provide name & address of account owner:

Amount Contributed by *Others* for 2023: _____

Beneficiary Name: _____ Amount Contributed: _____

Are you the owner of the Edvest or College Savings Account: Yes No

If no, provide name & address of account owner:

Amount Contributed by *Others* for 2023: _____

RETIREMENT

Important: If you are waiting to decide on a retirement plan contribution based upon your tax return, be sure you let us know when you submit your tax information, so we can discuss your options before we finalize your return.

Have you contributed or do you plan to contribute to any of the following for 2023?

Yes No (if you did not make the contribution yet, please do not list a date contributed)

Traditional IRA

Taxpayer: Amount: _____ Date Contributed: _____

Spouse: Amount: _____ Date Contributed: _____

Non-Deductible Traditional IRA

Taxpayer: Amount: _____ Date Contributed: _____

Spouse: Amount: _____ Date Contributed: _____

Roth IRA

Taxpayer: Amount: _____ Date Contributed: _____

Spouse: Amount: _____ Date Contributed: _____

Self-Employed (SEP) IRA

Taxpayer: Amount: _____ Date Contributed: _____

Spouse: Amount: _____ Date Contributed: _____

DEDUCTIONS/CREDITS/EXPENSES

Have you contributed or do you plan to contribute to a Health Savings Account for 2023?

Yes No (if you did not make the contribution yet, please do not list a date contributed)

Taxpayer: Amount: _____ Date Contributed: _____

Spouse: Amount: _____ Date Contributed: _____

Did you pay for Dependent Care Expenses in 2023? Yes No

If yes, please provide statement from the provider or list details below:

Child Name: _____ Amount Paid: _____

Provider Name: _____ Provider ID: _____

Provider Address: _____

Child Name: _____ Amount Paid: _____

Provider Name: _____ Provider ID: _____

Provider Address: _____

Medical/Vision/Dental

Insurance Premiums (do not list pre-tax premiums, Marketplace premiums or Medicare deducted from your Social Security income)

Medical: _____ Prescription: _____

Dental: _____ Vision: _____

LT Care (taxpayer): _____

LT Care (spouse): _____

Other: _____

Out of Pocket Expenses

Medical: _____ Dental: _____

Eye Care: _____ Prescriptions: _____

Long Term Care/Nursing Home: _____

Miles: _____ Other: _____

Taxes

Real Estate (list taxes paid in 2023)

Home: _____

Cottage: _____

Vacation Home: _____

Other: _____

Sales Taxes on major purchases

Item: _____ Tax Paid: _____

Item: _____ Tax Paid: _____

Mortgage interest

Residence - provide Forms 1098

Cottage, Vacation or Second Home - provide Forms 1098

Home Equity Line of Credit (can only be deducted if funds were used to buy, build or improve home) - provide Forms 1098

WISCONSIN SPECIFIC ITEMS

Rent paid for personal residence in 2023

Amount \$ _____ Was heat included in the rent? Yes No

Total amount of purchases you made (either online or out of state) in which you did not pay Wisconsin sales tax on - Amount \$ _____

Private school tuition paid in 2023 for your dependent to attend a private school located in Wisconsin

Name & Address of School: _____

School Tax ID Number: _____

Student Name: _____ Grade Attended: _____

Student Name: _____ Grade Attended: _____

Student Name: _____ Grade Attended: _____

If you would you like to donate to any of the following through your Wisconsin Tax Return, please list the donation amount:

Wisconsin Endangered Resources \$ _____

Cancer Research \$ _____

Veteran's Trust Fund \$ _____

Multiple Sclerosis \$ _____

Military Family Relief \$ _____

Second Harvest/Feeding America \$ _____

Red Cross Disaster Relief \$ _____

Special Olympics - WI \$ _____