

2023 Tax Organizer

Taxpayer Information

Last Name _____
First Name _____
Middle Initial _____ Suffix _____
Social Security number _____
Occupation _____
Work Phone _____ Ext _____
Cell Phone _____
E-mail address _____
Date of Birth _____

Spouse Information

Last Name _____
First Name _____
Middle Initial _____ Suffix _____
Social Security number _____
Occupation _____
Work Phone _____ Ext _____
Cell Phone _____
E-mail address _____
Date of Birth _____

Address _____
City _____ State _____
Home Phone _____

Apt No. _____
Zip-Code _____
Fax Number _____

Dependent Information

First Name	MI	Social Security Number	Date of Birth	Months Lived With Taxpayer	Child Care Expenses
Last Name	Suffix	Relationship			

Child and Dependent Care Provider Expense

Name	Address	ID Number	Amount Paid

Electric Filing, Direct Deposit of Refund, and Electronic Payment of Balance Due

If your tax return is eligible, it will be filing your return electronically to the Federal and State Agencies. Local returns have to mailed in.

If you are to receive a refund, from the Federal and State Agencies, would you like a direct deposit?

Yes / No

If YES, please provide a voided check with your bank account and routing numbers.

Account No.

Routing No.

If you have a payment due to the Federal and/or State Agencies, the banking information provided or on file will be used to schedule an electronic payer

Please use the "Tax Documents to Send to Preparer" sheet to provide the necessary documents to prepare your tax return. Be sure to provide ALL pages provided to you by the payor. Item omitted will delay the processing of your tax return.



2023 Tax Documents to Send to Preparer



Check items enclosed.

- ☐ Driver's License for taxpayer and spouse
- ☐ W-2 - Wages, Salaries, Tips and Other Compensation
- ☐ 1099-R - Distributions from Pension, Annuities, Retirement, Profit-Sharing, IRSS, etc.
- ☐ SSA-1099 - Social Security / Railroad Benefits
- ☐ 1099-MISC - Miscellaneous Income
- ☐ 1099-NEC - Non-Employee Compensation
- ☐ 1099-INT - Interest Income
- ☐ 1099-DIV - Dividend Income
- ☐ 1099-B - Sale of Stocks, Bonds, Real Estate, etc.
- ☐ 1099-G - Government Payments
- ☐ 1099-Q - Payments from Qualified Education Programs
- ☐ Schedule K-1- Partnership, S-Corporation, Trust or Estate Income
- ☐ W-2G - Gambling or Lottery Winnings
- ☐ Other Income documents such as Business Income, Rental Income, Farm Income, Alimony, Unreported Tips
- ☐ Contributions made to Retirement plans
- ☐ Medical and Dental Expenses
- ☐ Real Estate Taxes Paid
- ☐ Form 1098 - Home Mortgage Interest
- ☐ List of Cash Contributions
- ☐ List of Non-Cash Contribution
- ☐ Student Loan Interest Paid
- ☐ 1098-T - Education Tuition and Fees
- ☐ Child Care Provider Statements
- ☐ Estimated Taxes Paid for Federal, State, and Local Agencies
- ☐ Other Documents that you think may be a deduction for the preparation of your tax return.
- ☐
- ☐
- ☐

