

ROTH TAX PREPARATION FORM - 2023

Filing Status	
Single	
Head of Household	
Married Filing Separate	
Married Filing Joint	

- Only if you are unmarried with dependent and provide at least 50% of financial support

PERSONAL INFO		SPOUSE'S PERSONAL INFO	
Name (Last, First, Middle Init.)		Name (Last, First, Middle Init.)	
Social Security Number		Social Security Number	
Date of Birth (mm/dd/yy)		Date of Birth (mm/dd/yy)	
Occupation		Occupation	

CONTACT INFO	
Street Address	
Apt. #	
City	
State	
Zip Code	

CONTACT INFO for Spouse that resides separately	
Street Address	
Apt. #	
City	
State	
Zip Code	

	You		Spouse	
Can you be claimed a dependent on another's tax return? (ie: parent)	Yes	No	Yes	No

2023 RESIDENCY	
State of residency Dec.31, 2023	
If you moved, from what state?	
If so, what date did you move?	

DEPENDENTS					
First Name	Last Name	Date of Birth	Social Security #	Relationship	Tuition Expenses Total for that particular dependent (Itemize in the Chart Below)

TUITION OR CAREGIVER EXPENSE FOR YOUR DEPENDENTS under 13 years of age			
- Does not include kindergarten through 12th grade (Includes private care, preschool, afterschool and summer programs)			
Institution or Caregiver Name	Address	SSN or EIN (Mandatory Info)	Expense
Total			

QUARTERLY ESTIMATED TAX PAYMENTS MADE FOR 2023

IRS		State		Additional State	
		Which State Paid		Which State Paid	
Date Paid	Amount	Date Paid	Amount	Date Paid	Amount

BANK INFO (For direct deposit or tax owed)

Bank Name		
Type of Account	Checking	Savings
Routing Number		
Account Number		

ITEMIZED DEDUCTIONS**Medical Expenses** - *Note that if your medical expenses don't exceed 7.5% of your income it won't be deducted*

Prescription Medicines & Drugs	
Doctors, Dentists, Nurses, Chiropractor, Mental Therapy, Eye related expense, etc.	
Hospitals & Nursing Homes	
Health Insurance Premiums through Employer Group Plan - Taxpayer's portion	
Health Insurance Premiums through Employer Group Plan - Spouse's portion	
Health Insurance Premiums Paid Privately not through an Employer Group Plan - Taxpayer's portion	
Health Insurance Premiums Paid Privately not through an Employer Group Plan - Spouse's portion	
Total	

Taxes You Paid - *You may leave this section blank if you provide me with your 1098 from your bank*

Real Estate Taxes (primary home)	
Real Estate Taxes (secondary home)	
Personal Property Taxes (ie: automobile)	
Total	

Interest You Paid - *You may leave this section blank if you provide me with your 1098 from you bank*

Mortgage Interest (primary home)	
Points (primary home)	
Mortgage Interest (secondary home)	
Points (secondary home)	
Coop Interest on Underlying Mortgage - <i>Coop's management's accountants will provide a shareholder letter in Jan.</i>	
Mortgage Insurance Premium (usually in box 4 on your 1098)	
Total	

Gifts To Charity

Made by Credit Card, Cash or Check	
Other than Cash or Check (ie:item donations to Goodwill, etc) if over \$500 total you MUST provide RECEIPTS from donation sites.)	
Total	

JOB EXPENSES for income received through 1099-misc and cash - NOT W2 INCOME

Please list business or profession?		Taxpayer	Spouse
Professional Fees		Promotion Supplies	
Legal		Website	
Accounting/Bookkeeping		Resume, Headshot, Other Promotional Materials	
Tax Preparer		Advertising	
Agent/Manager Fees NOT related to w2 jobs		Demos	
Agent/Manager Fees related to w2 jobs		Postage & Mailing Supplies	
Wages in Total - including submitted 1099-necs		Office Supplies	

Professional Dues/Work Dues	
Professional Dues NOT RELATED to w2 Work	
Professional Dues RELATED to w2 Work	

Artistic Performance Specific Expenses	
Hair & Makeup	

Continued Education	
Conferences, etc.	
Other Training Expenses	

Gifts	
Gifts to Colleagues (\$25 per recipient gift limit)	
Professional Tips NOT associated with w2 jobs	

Research	
Professional Publications/Sheet Music/Scripts	
Art Event Tickets (shows, concerts, etc)	
Movies	
Video Rentals (ie:Netflix, Hulu, Amazon, etc)	
Music Recordings & Streaming Services	
Other Research Expenses	

Equipment & Related Expenses	
Musical Instruments/Tools of trade in Total	
<small>**Please list all single items over \$500 included in the above TOTAL on the next page</small>	
Electronics/Gear (related to profession) in Total	
<small>**Please list all single items over \$500 included in the above TOTAL on the next page</small>	
Rent for Equipment Storage	
Rent for Rehearsal Space	
Repairs for Instruments	
Insurance (equipment or instruments)	

Communication & Research Utilities	
Internet	
Zoom, Apple Storage, Dropbox, etc	
Telephone	
Cable TV Service (eligible to Actors)	

Food & Entertainment (LOCAL ONLY)	
Business Meals (LOCAL ONLY)	

Transportation (Local Only)	
Taxis, Buses, Car Rental, etc.	
Parking Fees & Tolls	

Business Use of Car	
Date vehicle was purchased (mm/dd/yy) est.	
Year & Make of Vehicle	
Total miles driven for the year Personal & Biz	
Total miles for only business	

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Expenses Away From Home for TAXPAYER (OVERNIGHT STAY ONLY & 1099 INCOME ONLY-NOT W2)

City, State, Country	# of days spent	Lodging Costs	Meal Costs (IRS Per Diem Rate will be Figured for you)	Airfare	Transportation Expense (ie: luggage, rental car, parking, etc)	Per Diem Paid To You
Totals						

Rental Property Income

Rental Income Received	
Address of Rental	
Number of Days Rented in 2023	
Number of Days for Personal Use in 2023	

Did you manage the property yourself? Yes No

Expenses	
Advertising	
Association Dues	
Cleaning & Maintenance	
Commissions	
Gardening	
Insurance	
Legal & Professional Fees	
Licenses and Permits	
Management Fees	
Miscellaneous	
Mortgage Interest	
Rent Paid	
Painting & Decorating	
Pest Control	
Plumbing & Electrical	
Repairs	
Supplies	
Real Estate Taxes	
Telephone	
Utilities	

2nd Rental Property Income

Rental Income Received		
Address of Rental		
Number of Days Rented in 2023		
Number of Days for Personal Use in 2023		

Did you manage the property yourself?	Yes	No
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Expenses	
Advertising	
Association Dues	
Cleaning & Maintenance	
Commissions	
Gardening	
Insurance	
Legal & Professional Fees	
Licenses and Permits	
Management Fees	
Miscellaneous	
Mortgage Interest	
Rent Paid	
Painting & Decorating	
Pest Control	
Plumbing & Electrical	
Repairs	
Supplies	
Real Estate Taxes	
Telephone	
Utilities	

TAXPAYER HOME OFFICE DEDUCTION - Only those with 1099-misc or cash income can qualify*If you conduct a business out of your home you may be eligible for a deduction (if you have a dedicated space)*

Total Area of Home (square footage)	
Area Used for Business (square footage)	

Mortgage Interest (I'll compute from Form 1098)	
Property Tax (I'll compute from Form 1098)	
Annual Rent	
Repairs and Maintenance	
Insurance (Homeowners or Renters)	
Utilities (Electricity, Gas, Water)	

SPOUSE HOME OFFICE DEDUCTION - Only those with 1099-misc or cash income can qualify*If you conduct a business out of your home you may be eligible for a deduction (if you have a dedicated space)*

Total Area of Home (square footage)	
Area Used for Business (square footage)	

Mortgage Interest (I'll compute from Form 1098)	
Property Tax (I'll compute from Form 1098)	
Annual Rent	
Repairs and Maintenance	
Insurance (Homeowners or Renters)	
Utilities (Electricity, Gas, Water)	

2nd HOME OFFICE DEDUCTION - Those that have moved to a new property within the year*If you conduct a business out of your home you may be eligible for a deduction (if you have a dedicated space)*

Total Area of Home (square footage)	
Area Used for Business (square footage)	

Mortgage Interest (I'll compute from Form 1098)	
Property Tax (I'll compute from Form 1098)	
Annual Rent	
Repairs and Maintenance	
Insurance (Homeowners or Renters)	
Utilities (Electricity, Gas, Water)	

Use the text box below to provide additional information that you didn't find a place for on this prep form. You can leave numbers and descriptions and I will make sure to include that in the preparation of your tax returns.