

Taxpayer _____ SSN _____ DOB _____ Phone _____

Spouse _____ SSN _____ DOB _____ Phone _____

Email Addresses _____

Address _____

Can We Email you? Yes ___ No ___ Can We Text you? Yes ___ No ___

Single ___ Married ___ Divorced ___ Legally Separated ___ Married filing Sep ___

Please do NOT bring your documents until you have ALL your information, OR email us when you loaded your last document onto the portal. Thank you!

YES/NO Personal

_____ Did your address change during the year?

_____ Did your Marital status change in 2023? If so explain _____

_____ Did anyone live with you in 2023? Name _____ Relation _____

YES/NO Dependent Information

_____ Did you have any changes in dependents during the year? If "Yes," explain.

_____ Can another person qualify to claim the child? _____ Did you have any childcare expenses during the year? _____ Did you have any adoption expenses during the year? _____

_____ Did you have any children under age 24 with **unearned** income? ___ earned income? _____

YES/NO Healthcare

_____ **MARKETPLACE HEALTH CARE COVERAGE** did you purchase it? If so 1095 A.

_____ Do you have a health savings account with Montana?

YES/NO Income

_____ Did you have a W-2? If so, how many? _____

_____ Did you receive any 1099's **for work you performed** as a subcontractor? _____ If so, how many? _____

_____ Are you involved with any foreign accounts or income?

_____ Did you buy, sell or use virtual currency or bitcoin at all in 2023?

_____ Did you receive any tips not reported to your employer? How much? \$ ___ From _____

_____ Did you receive any disability income during the year? From where? _____

_____ Any interest earned from checking or savings accounts or contracts?

_____ Did you cash any U.S. savings bonds during the year? Form from Bank needed.

_____ Did you sell any stocks, bonds, or other investments? Paperwork needed.

_____ Did you receive any payments from a pension, profit sharing, or 401(k) plan? 1099R

_____ Did you make any withdrawals an IRA, Roth, Keogh, SIMPLE, SEP, myRA. Need 1099R.

_____ Did you receive any Social Security benefits during the year? How many forms? _____

_____ Did you receive any principal or interest, during this year, from property sold in prior years?

_____ Did you rent to others any personal or real property? Did you rent any part of your home?

_____ Were you involved in any Businesses or own any Rentals?

_____ Did you receive any state or local income tax refunds from prior years?

_____ Did you receive **ANY other income not mentioned in this organizer? If "Yes," explain below. ALL income is reportable, whether it is taxable or not.**

YES/NO Adjustments

pg2/2.

_____ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Did you pay student loan interest for yourself, your spouse, or your dependent(s)?

YES/NO Deductions – must have receipts for any deductions you claim.

_____ Did you pay medical or dental expenses or health insurance premiums? Medical miles? _____

_____ Did you pay any property taxes, vehicle license, or INCOME taxes during the year?

_____ Did you pay mortgage interest during the year?

_____ Did you make **cash donations** to **charity** during the year and/or did you make noncash donations to charity (clothes, furniture, etc.) during the year? We will need Receipts/Amounts/Address donated to etc.

YES/NO Education

_____ Did anyone in your household attend a post-secondary school during the year? Need 1098T.

_____ Did you contribute to an Education Savings Account?

YES/NO Other

_____ Did you sell, foreclose on or abandon any residence or real property?

_____ Did you refinance your principal home or second home or take out a home equity loan during the year? If so, what did you spend any cash on? _____

_____ Did you sell, exchange, or purchase any real estate during the year?

_____ Are you involved in a Partnership or S corporation?

_____ Did you have any debts canceled or forgiven this year?

_____ Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?

_____ Did you give any gifts to any one person more than \$16,000 during the year? If "Yes," are you splitting the gift with your spouse?

_____ Did you make any energy-efficient improvements to your main home during the year?

_____ Do you want to have any refund directly deposited? If "Yes," provide a canceled checking or savings slip. Routing # _____ Acct# _____ Type of Acct _____

_____ Did you receive any notices from the IRS or state taxing authority? If yes include.

_____ Did you include All documentation needed to complete your return.

Please do NOT bring any information until you have **ALL your information** together.

Please include all income and deduction **forms**. And information on anything you marked **YES**.

NEW clients bring in your 2021 and 2022 tax returns, SS Cards for everyone on the return and picture IDs for the Taxpayer and Spouse.

Payment is required at the time of service.

By signing below, you declare you have included all your income deductions and that you have receipts for each deduction. You agree that the above information is correct and complete and may be used to prepare your income tax return.

Taxpayer (SIGN) _____ print _____ Date _____

Spouse (SIGN) _____ print _____ Date _____