

BRACEY'S PROFESSIONAL TAX SERVICE

BRACEYSTAX.COM



301.782.7600

2023 Tax Organizer



- As W2's, 1099's, investment earnings and mortgage statements arrive, put them in a folder or secure area.
- Ask your child care provider for their tax identification number.
- Have your taxes prepared early; avoid last minute filing.
- · Check your records for out of pocket medical and dental expenses. Don't forget mileage.
- Employer deferred 401K and 403B plan accounts are the best way to save on your taxes and build your retirement.
- You must have your dependent's social security number in order to claim them on your tax return.

BPTS, Inc. strives to make your tax filing experience pleasant and rewarding.

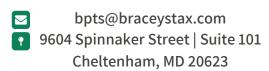


Serving you for over 40 years.

clients our first

priority.





2023 Tax Organizer

Income Items

Wages

Bonus/Commissions
☐ Cancellation of Debt Income
☐ State Tax Refunds
Alimony
☐ Unemployment Compensation
Social Security
☐ 1099 Income/Statements (All)
Gambling - W2G
401K Withdrawals
Pension Plans
☐ Profit Sharing
Interest Dividend Income
(please list)
(please list) <u>Savings/CD/Money Market</u>
Savings/CD/Money Market
Savings/CD/Money Market Stock Sales (provide basis) Health Insurance Information
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Taxes(\$10K cap)

Real Estate
State/Local Taxes
Personal Property
Other:
Interest Paid
☐ Home Mortgage
Home Equity/Line of Credit
HUD-1 Settlement Statement
(Purchase or Refinance)
☐ Deductible Points
☐ Investment Interest
Student Loan Interest
☐ Mortgage Insurance Premiums
Child Care Expenses
(Must have the following information)
(Must have the following information) Name:
(Must have the following information) Name: Address:
(Must have the following information) Name:
(Must have the following information) Name: Address:
(Must have the following information) Name: Address: Tax ID#:
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(Must have the following information) Name: Address: Tax ID#:
(Must have the following information) Name:
(Must have the following information) Name: Address: Tax ID#: Other Itemized Deductions Gambling Losses
(Must have the following information) Name:
(Must have the following information) Name:
(Must have the following information) Name:

Employee Business Expense NO LONGER AVAILABLE

(with a few exceptions)

Contributions

Church: \$Charities: \$ Charities: \$ Other than cash: Curple Heart:	
	Amvets:
	alvation Army: ig Brothers Big Sisters: oodwill:
Volunteer Work Expenses:	
Volunteer Mileage:	
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pre- tax expenses are not deductible.	
☐ Insurance Premiums	
Prescription Drugs	
☐ Doctor Dental	
Chiropractor	
Hospital	
☐ Labs Tests X-Rays	
Therapy	



☐ Transportation | Mileage