



BRACEY'S
PROFESSIONAL
TAX SERVICE
BRACEYSTAX.COM
301.782.7600



Tax Filing Tips

- 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.



Providing prompt,
personable,
reasonable,
reliable, year-round
tax and financial
services, making
clients our first
priority.

Serving you for over 40 years.

2023 Tax Organizer



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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)

Savings/CD/Money Market

Stock Sales (provide basis)

Health Insurance Information

(family members and policy name and ID)

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)

Name: _____

Address: _____

Tax ID#: _____

Other Itemized Deductions

- Gambling Losses
- Estate Taxes
- Ponzi Scheme Losses

Retirement Accounts

Fee(s): _____

Contribution(s): _____

Employee Business Expense NO LONGER AVAILABLE

(with a few exceptions)

Contributions

Church: \$ _____

Charities: \$ _____

Other than cash: _____

Purple Heart: _____

Amvets: _____

Salvation Army: _____

Big Brothers | Big Sisters: _____

Goodwill: _____

Other 501(c3) Charities: _____

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



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