

2023 Individual Taxpayer Organizer



Taxpayer				Tax ID # *	
First Name	M.I.	Last Name	Email		IP PIN
Occupation		Date of birth	Were you a client of Angela Claiborn? Yes No		
Address		City	State	Zip	
County		Primary phone		Secondary phone	
Driver's License	No.	State	Issue Date	Exp. Date	

Spouse				Tax ID # *	
First Name	M.I.	Last Name	Email		IP PIN
Occupation		Date of birth	Were you a client of Angela Claiborn? Yes No		
Address <small>(if different from Taxpayer)</small>		City	State	Zip	
County		Primary phone		Secondary phone	
Driver's License	No.	State	Issue Date	Exp. Date	

If you moved during 2023, enter your previous address.				Date of move	
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Marital status on 12/31/23: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
Notices: Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependents Full name	Tax ID # *	Date of birth	Months lived in home in 2023	Relationship to taxpayer	College student? FT/PT	Income

Did any of the children have unearned income above \$1,250 for the year? Yes No Do any of the children have a disability? Yes No
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Bank information: Use for		Direct deposit of refund	Direct debit of balance due	Name of bank _____
Checking	Savings	Routing transit number		Account number

Estimated Tax Payments — Tax Year 2023

Installment	Date paid	Federal	Date paid	State
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2022 overpayment		\$		\$
Total		\$		\$

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — ask your preparer if unsure about a question.

LIFESTYLE	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Did you pay or receive alimony in 2023? <i>Paid Received \$</i>	<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>	
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?			
	Yes	No	Did you purchase a new or used energy-efficient, hybrid, or electric car, truck, or van?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?	State of residency		
	Yes	No	Were you a citizen of or lived in a foreign country?	Foreign country		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? <i>Maximum value \$</i>			
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2023? (Provide statement for other expenses.)			
	Yes	No	Were any children attending college? (Provide Form 1098-T and Form 1098-E.)			
			<i>Year in college</i>	<i>Paid by you: Tuition \$</i>	<i>Books \$</i>	<i>Student loan interest \$</i>
				<i>Paid by student: Tuition \$</i>	<i>Books \$</i>	<i>Student loan interest \$</i>
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			<i>Student</i>	<i>Amount paid \$</i>		
			<i>Name and address of school</i>			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)			
			<i>Name of provider</i>	<i>EIN or SSN</i>		
			<i>Address</i>	<i>Amount paid \$</i>		
Yes	No	Do you have any children who have unearned income of \$1,250 or more?				
Yes	No	Did you make any contributions to a 529 plan in 2023?				
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2023?	Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2023?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2023?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2023?			
	Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (Digital assets include cryptocurrencies, NFTs, and stablecoins)			
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money before April 15, 2024 to an HSA for 2023? If yes, provide details.			
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2023, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2023? If yes, provide details.			
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

State information Full-year resident Part-year resident Nonresident School district

States of residence during 2023 and dates Do you rent or own your home? Rent Own

Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, 1099-NEC, 1099-K, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

Indicate "T" for taxpayer, "S" for spouse, "J" for joint

Provide additional statements if more room is needed

Forms W-2 – Wage and Tax Statement

T/S	Employer name	T/S	Employer name
	1)		4)
	2)		5)
	3)		6)

Forms 1099-INT – Interest Income

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-DIV – Dividends and Distributions

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-R – Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.

T/S	Name of issuer	T/S	Name of issuer
	1)		4)
	2)		5)
	3)		6)

If the distribution is before age 59½, give a reason to determine if an exception to penalty applies.

Tax-Exempt Interest (such as municipal bonds – include statement)

Payer	\$	Payer	\$

Other Income

State tax refund	\$	Unreported tips	\$
Unemployment compensation	\$	Other	\$
Social Security (taxpayer) – provide SSA-1099 or RRB-1099	\$		\$
Social Security (spouse) – provide SSA-1099 or RRB-1099	\$		\$
Gambling income – provide Form W-2G	\$		\$
Business income (see <i>Sole Proprietorship Tax Organizer</i>)		Stock sales	See "Sales and Exchanges Worksheet" below.
Rental income (see <i>Rental Property Tax Organizer</i>)		Sale of other property	

Adjustments Worksheet

<i>Educator expenses.</i> Classroom expenses of teachers, counselors, and principals. Maximum \$300 each.	\$
<i>Health savings account (HSA).</i> Contributions for 2023 may be made up until April 15, 2024. (Only include contributions you made out-of-pocket).	\$
<i>Self-employed SEP, SIMPLE, and qualified plans.</i> Contributions for 2023 may be made up until April 15, 2024.	\$
<i>Self-employed health insurance.</i> Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	\$
<i>Penalty on early withdrawal of savings.</i>	\$
<i>IRA deduction.</i> For traditional IRAs. Roth IRAs are not deductible. Contributions for 2023 may be made up until April 15, 2024.	\$
<i>Student loan interest.</i> Paid for taxpayers and dependents.	\$
<i>Moving expenses.</i> Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a military order and incident to a permanent change of station.	Ask preparer
<i>Business expenses of reservists, performing artists, and fee-based government officials.</i>	Ask preparer
<i>Other adjustments.</i> Include description.	\$

Tax Preparation Checklist

Please provide the following documentation:

- All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
- Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- If you are a new client, provide copies of 2021 and 2022's tax returns.
- The completed Individual Income Tax Organizer. **Note:** If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions – All Taxpayers, along with the Dependency questionnaire and Head of Household questionnaire if applicable"
- Copy of the closing statement if you bought, sold, or refinanced real estate.
- Mileage amounts for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
- Detail of estimated tax payments made, if any.
- Income and deductions categorized on a separate sheet for business or rental activities.
- List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made in 2023.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.