

2023 Tax Organizer Personal Information

Personal Information

Name	SSN	Has IP PIN	Date of Birth
Taxpayer			
Spouse			
Name of person to whom all information should be addressed, if not the taxpayer			
Street address, city, state, and ZIP			
Occupation	Daytime Phone	Evening Phone	Cell Phone
Taxpayer			
Spouse			
Taxpayer email			
Spouse email			

Filing status at the end of 2023

Single Married Widowed - If widowed and your spouse died after December 31, 2021, enter the date of death _____

Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2023? _____

Yes No

Are you or your spouse blind?

Are you or your spouse disabled?

Are you or your spouse a full-time student?

Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?

At any time during 2023 did you:

(a) receive (as a reward, award, or payment for property or service) a digital asset?

(b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Identification Information

Taxpayer's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Spouse's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2023 appointment is scheduled for _____

Questionnaire

Name:

SSN:

Questionnaire

Personal Information

Yes No

- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

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

Health Care Information

Yes No

- Did any member of your household have healthcare coverage through the Marketplace (Obamacare)? If yes, please provide documentation.
If "Yes," provide copies of Form 1095-A.

Income, Purchases, Sales, and Debt Information

- Did you receive income or incur expenses associated with car sharing (e.g. Lyft, Uber), freelancing (e.g. Upwork, TaskRabbit), fashion sharing (e.g. Poshmark, thredUP), crowdfunding (e.g. Kickstarter, Indiegogo), short-term rentals (e.g. Airbnb, VRBO, HomeAway) or as an independent contractor (e.g. Shipt, Instacart, DoorDash)?

Education Information

Yes No

- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
 Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
If "Yes," provide the amount of interest that was refunded.

Foreign Tax Information

Yes No

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
 Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
 Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

Refund, Withholding, and Estimated Tax Information

Yes No

- If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?
 Did you make any estimated payments toward your 2023 taxes? If "Yes," provide a canceled checking or savings slip.

Miscellaneous Information

Yes No

- Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset?
 Did you make gifts to any one person in excess of \$17,000 during the year?
 May the IRS discuss your tax return with your preparer?
 Do you operate a business that received an employee retention credit? If yes, please provide all documentation associated with the refund.
 Are you the owner of an LLC or other entity formed in any state?
 If yes, are you aware of the ownership filing requirements for all entities.

Information is available at our front desk.