

Information

To help us prepare and file a complete and accurate return for tax year 2023, please fill-out this first page.

For New / Existing Clients:

Taxpayer Name: _____ Birth: ___ / ___ / ___

Spouse Name: _____ Birth: ___ / ___ / ___

Address: _____

Email: _____

Phone: _____

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Filing status: Single Married filing jointly Married filing separately (MFS)

Head of household (HOH) Qualifying surviving spouse (QSS)

Any Changes From Previous Year (please describe):

New Client Information:

please provide - 2 prior year's tax returns

Taxpayer

Driver's License: _____ State: _____ Expiration: _____ SSN: _____

Spouse

Driver's License: _____ State: _____ Expiration: _____ SSN: _____

Dependent(s):

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Dependent Name: _____ SSN: _____ Birth: ___ / ___ / ___

Tax Organizer - 2023

Please collect and provide us with any of the following forms and information you have received for your 2023 income tax return:

- W-2** for wages
- W-2G** for gambling
- 1099-Int** for interest
- 1099-DIV** for dividends
- 1099-B** Brokerage
- SSA-1099** Social Security
- 1099-NEC** for income
- 1099-MISC** for income
- 1099-K** for online payment and money transactions
- 1099-R** for retirement
- 1099-G** for refunds & unemployment
- 1099-INT** for mortgages
- 1098-T** for tuition
- 1099-E** for student loan interest
- 1099-SA** for HSA's
- 1095-A** Health Insurance Marketplace
- K-1** forms from investments in S corporations or partnerships
- Form 5498** for IRA values
- IRA** and **Roth IRA** contributions for 2023
- Child care costs, and the name, address, amount, and ID # of the recipient
- Charitable donations-total amounts and recipients
- Property tax paid on your home, property, or cars
- Medical expenses paid out of pocket
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities
- Direct deposit information - name of banking institution, bank account and routing number