This Tax Organizer is designed to help you collect and report the information needed to prepare your 2023 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2023 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

You do not need to provide 2022 data if we have your 2022 tax return

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2022 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, Form 1099-NEC or Form 1099-K.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ Copies of invoices regarding residential clean energy improvements.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

Taxpayer Information		Spouse Information	
Last name		Last name	
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Occupation		Occupation	
Work phone	Ext	Work phone	Ext
Cell phone		Cell phone	
E-mail address		E-mail address	
Date of birth		Date of birth	
Address		Apartment number	
City	State	ZIP Code	
Home phone	Fax number		

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2023 qualified student loan interest .... ____

PERSONAL INFORMATION

		Yes	No
1	Did your marital status change during 2023?	☐	☐
	If **yes,** explain ________		
2	Do you want to allow your tax preparer to discuss this year's return with the IRS?	☐	☐
	If **no,** enter another person (if desired) to be allowed to discuss this return with the IRS. **Caution:** Review any transferred information for accuracy.		
	Designee's Name ► ________		
	Phone Number ► ________ Personal Identification Number (5 digit PIN) ► ________		
3	Do you or your spouse plan to retire in 2024?	☐	☐
4	Were you or your spouse permanently and totally disabled in 2023?	☐	☐
5	Enter date of death for taxpayer or spouse (if during 2023 or 2024): Taxpayer: ________ Spouse: ________		
6	Were you or your spouse a member of the U.S. Armed Forces during 2023?	☐	☐

DEPENDENT INFORMATION

		Yes	No
7 a	Do you have dependents who must file?	☐	☐
b	If **yes,** do you want us to prepare the return(s)?	☐	☐
8 a	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,500?	☐	☐
b	If **yes,** do you want to include your child's income on your return?	☐	☐
9	Are any of your dependents **not** U.S. citizens or residents?	☐	☐
10	Did you provide over half the support for any other person during 2023?	☐	☐
11	Did you incur adoption expenses during 2023?	☐	☐

IRA, PENSION AND EDUCATION SAVINGS PLANS

		Yes	No
12	Did you receive payments from a pension or profit-sharing plan?	☐	☐
13	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
14a	Did you convert all or part of a regular IRA into a Roth IRA?	☐	☐
b	Did you roll over all or part of a qualified plan into a Roth IRA?	☐	☐
15	Did you contribute to a Coverdell Education Savings Account?	☐	☐

ITEMS RELATED TO INCOME/LOSSES

		Yes	No
16	Did you receive any disability payments in 2023?	☐	☐
17	Did you receive tip income **not** reported to your employer?	☐	☐
18	Did you buy, sell, refinance, or abandon a principal residence or other real property in 2023? (Attach copies of any escrow statements or Forms 1099.)	☐	☐
19a	If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?	☐	☐
b	Are you planning to purchase a home soon?	☐	☐
c	Did you incur any casualty or theft losses during 2023?	☐	☐
20	Did you incur any non-business bad debts?	☐	☐

PRIOR YEAR TAX RETURNS

		Yes	No
21	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes,** enclose agent's report or notice of change.	☐	☐
22	Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?	☐	☐

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

		Yes	No
23	Did you have foreign income or pay any foreign taxes in 2023 ?	☐	☐
24a	At any time during 2023 , did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
b	Did the aggregate value of all your foreign accounts exceed $10,000 at any time during 2023 ? Report all interest income on Org 11	☐	☐
25	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐
26	Did you at any time during 2023 , have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded $50,000 in value at any time during the year?	☐	☐

HEALTH AND LIFE INSURANCE

		Yes	No
27	Did you receive Form 1095-A (Health Coverage)? If so, please attach	☐	☐
28a	Did you or your spouse have self-employed health insurance?	☐	☐
b	If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
29	Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐
30	Did you contribute to or receive distributions from a Health Savings Account (HSA)?	☐	☐

MISCELLANEOUS

		Yes	No
31	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023 ? If **yes,** please attach details	☐	☐
32	Did you purchase a motor vehicle or boat during 2023 ? If **yes,** attach documentation showing sales tax paid.	☐	☐
33	Did you purchase an energy efficient vehicle in 2023 ? If **yes,** enter year, make, model, and date purchased: ______ also provide VIN: ______	☐	☐
34	Did you donate a vehicle in 2023 ? If yes, attach Form 1098C	☐	☐
35	What was the sales tax rate in your locality in 2023 ? ______ % State ID .... ____		
36	Did you or your spouse make gifts of over $17,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
37	Did you make gifts to a trust?	☐	☐
38	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes,** please attach details.	☐	☐
39	Did you or your spouse participate in a medical savings account in 2023 ? If **yes,** please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)	☐	☐
40	Did you make a loan at an interest rate below market rate?	☐	☐
41	Did you pay any individual for domestic services in 2023 ?	☐	☐
42	Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
43	Did you, your spouse, or your dependents attend post-secondary school in 2023 ?	☐	☐
44	Did a lender cancel any of your debt in 2023 ? (Attach any Forms 1099-A or 1099-C)	☐	☐
45	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
46	At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	☐	☐
47	Did you obtain a Paycheck Protection Program (PPP) loan?	☐	☐
	If yes, has any portion of that loan been forgiven?	☐	☐
48a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language? ______		

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

		Yes	No
49	If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
50	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

Caution: Review transferred information for accuracy.

51 If **yes,** please provide the following information:

a Name of your financial institution ______

b Routing Transit Number (must begin with 01 through 12 or 21 through 32) ______

► c Account number ______

d What type of account is this? Checking ☐ Savings ☐

☑ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

		Yes	No
1	Did a lender cancel any of your debt in 2023? (Attach any Forms 1099-A or 1099-C)	☐	☐
2	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023? If **yes,** please attach details	☐	☐
3	Did you purchase a motor vehicle or boat during 2023? If **yes,** attach documentation showing sales tax paid.	☐	☐
4	Did you purchase a hybrid or electric vehicle in 2023? If **yes,** enter year, make, model, and date purchased: ____	☐	☐
5	Did you donate a vehicle in 2023? If **yes,** attach Form 1098C	☐	☐
6	What was the sales tax rate in your locality in 2023? ...... ____ % State ID .... ____		
7	Did your marital status change during 2023? If **yes,** explain: ____	☐	☐
8	Were you or your spouse permanently and totally disabled in 2023?	☐	☐
9	Do you have dependents who must file?	☐	☐
10	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,500?	☐	☐
11	Did you provide over half the support for any other person during 2023?	☐	☐
12	Did you incur adoption expenses during 2023?	☐	☐
13	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
14	Did you receive any disability payments in 2023?	☐	☐
15	Did you receive tip income **not** reported to your employer?	☐	☐
16 a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If **yes,** attach closing or escrow statements, 1099-C or 1099-A forms	☐	☐
b	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
17	Did you incur any casualty or theft losses during 2023?	☐	☐
18	Did you incur any non-business bad debts?	☐	☐
19	Did you pay any individual for domestic services in 2023?	☐	☐
20	Did you buy or sell any stocks or bonds in 2023?	☐	☐
21	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
22	Did you incur any moving expenses? If **yes,** attach details	☐	☐
23	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
24	Do you expect your income and deductions in 2024 to be the same as 2023? If **no,** attach explanation of changes expected.	☐	☐
25	Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	☐	☐
26	At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	☐	☐
27	**a** Did you obtain a Paycheck Protection Program (PPP) loan?	☐	☐
	b If yes, has any portion of that loan been forgiven?	☐	☐
28	If you paid any alimony, enter recipient's SSN: ____ Alimony paid: ____		
29	Enter your state of residence ...... **Taxpayer** ____ **Spouse** ____		
30 a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language? ____		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

If **yes,** please provide a voided check (not a deposit slip) if your bank account information has changed.
What type of account is this? ...... Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

Business/Investment Questions

		Yes	No
1	Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	☐	☐
2	Did you buy or sell any stocks or bonds in 2023 ? If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	☐	☐
3	Did you surrender any U.S. savings bonds during 2023 ?	☐	☐
4	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
5	Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	☐	☐
6	Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	☐	☐
7	Do you have any investments for which you were **not** personally 'at risk' (other than sole proprietorship or farm)?	☐	☐
8	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2023 ?	☐	☐
9	Did you sell property or equipment on installment in 2023 ?	☐	☐
10	Did you have any business related educational expenses?	☐	☐
11	Did you do a 'like-kind' exchange of property in 2023 ?	☐	☐
12	Deductions for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: **1** Amount; **2** Time and place; **3** Date; **4** Business purpose; **5** Description of gift(s); and **6** Business relationship of recipient. Do you have records to support expenses?	☐	☐
13	Did you purchase special fuels for non-highway use? If **yes**, please list the type of use and the number of gallons for each fuel.	☐	☐

Adjustments to Income

TRADITIONAL IRA CONTRIBUTIONS	Taxpayer	Spouse
1 Traditional IRA contributions made for 2023		
2 Check if you were covered by a retirement plan at work	☐	☐
3 Check if you wish to make an additional contribution to your traditional IRA before the due date of your return	☐	☐
4 If line 3 is checked, check this box to contribute the maximum allowable amount	☐	☐
5 Or enter the amount you wish to contribute		
If you (a) received traditional IRA distributions during 2023 **and** you have made **nondeductible** IRA contributions to any of your traditional IRAs, including SIMPLE IRAs, **OR** (b) choose to make any **nondeductible** traditional IRA contributions for 2023, please provide this information:		
6 Enter the value of **all** of your IRAs on 12/31/2023		
7 Enter the value of **all** recharacterizations after 12/31/2023		
8 Enter the amount of any outstanding rollovers as of 1/1/2024		
If you received IRA distributions during 2023, please complete ORG7.		

ROTH IRA CONTRIBUTIONS	Taxpayer	Spouse
1 Roth IRA contributions made for 2023		
2 Check if you wish to make an additional contribution to your Roth IRA before the due date of your return	☐	☐
3 If line 2 is checked, check this box to contribute the maximum allowable amount	☐	☐
4 Or enter the amount you wish to contribute		

SELF-EMPLOYED PENSION CONTRIBUTIONS	Taxpayer	Spouse
Money Purchase Plan Keogh and Multiple Plans:		
1 a Payments made and/or expected to be made to a money purchase Keogh plan for 2023		
b Check this box if you wish to contribute the maximum amount to your money purchase Keogh for 2023	☐	☐
Profit Sharing Plan Keogh:		
2 a Payments made and/or expected to be made to a profit sharing Keogh for 2023		
b Check this box if you wish to contribute the maximum amount to your profit sharing Keogh for 2023	☐	☐
Defined Benefit Plan Keogh:		
3 Payments made and/or expected to be made to a defined benefit Keogh plan for 2023		
SEP:		
4 a Payments made and/or expected to be made to a SEP for 2023		
b Check this box if you wish to contribute the maximum amount to your SEP for 2023	☐	☐
Self-Employed SIMPLE Plan:		
5 a Payments made and/or expected to be made to a self-employed SIMPLE plan for 2023		
b Enter matching contributions only to report on Form 1040 to a self-employed SIMPLE plan for 2023		
Individual 401(k):		
6 a Elective deferrals made and/or expected to be made to an Individual 401(k) plan for 2023		
b Catch-up contributions made and/or expected to be made to an Individual 401(k) for 2023		
c Employer matching profit-sharing contribution made and/or expected to be made to an Individual 401(k) plan for 2023		
d Check this box if you wish to contribute the maximum amount to your Individual 401(k) for 2023	☐	☐
Roth 401(k):		
7 a Elective deferrals made or expected to be made to a designated Roth 401(k) plan for 2023		
b Catch-up contributions made or expected to be made to a designated Roth 401(k) plan for 2023		

ALIMONY PAID

	Recipient's name	Recipient's SSN	Alimony paid
1			
2			

2023 Deductions

Medical and Dental Expenses

	2023 Amount	2022 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		

Other medical and dental expenses:

Taxes

	2023 Amount	2022 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name	2023 Amount	2022 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2023 Amount

Cash/Check/Credit Contributions

	2023 Amount	2022 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2023 Amount	2022 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		

Other expenses (list):

Tax Payments

2023 ESTIMATED TAX PAYMENTS

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1 Qtr 1 due by 04/15/23								
2 Qtr 2 due by 06/15/23								
3 Qtr 3 due by 09/15/23								
4 Qtr 4 due by 01/18/24								
5 a Additional payments								
b Additional payments								
c Additional payments								
d Additional payments								

OTHER TAX PAYMENTS

	Federal	State	Local
6 2022 overpayment applied to 2023			
7 Balance due paid with 2022 return			
8 a 2022 Quarter 4 payments paid in 2023			
b 2022 extension payments paid in 2023			
9 Other taxes paid in 2023 for prior years (include explanation)			

2024 ESTIMATED TAX WORKSHEET

If you expect any significant change in your income or expenses in 2024, please enter the increase or decrease below.

Income

10 Wages .... Taxpayer .... ____________
Spouse .... ____________
11 Self-Employment Income .... Taxpayer .... ____________
Spouse .... ____________
12 Capital Gains (sale of stock, real estate, etc) .... ____________
13 Other Income:
Description .... ____________ ____________

Deductions

14 Allowable Itemized Deductions .... ____________
15 Other deductions (such as alimony paid, early withdrawal penalties, etc):
Description .... ____________ ____________
16 Federal Withholding .... ____________
17 Number of personal exemptions expected for 2024 .... ____________

ADDITIONAL INFORMATION

18 Check to use your 2023 tax amount for your 2024 estimate .... ☐
19 If you have an overpayment of 2023 taxes, check the box to indicate how you want your overpayment applied.
a Apply entire overpayment to next year and refund excess .... ☐
b Apply entire overpayment to first quarter and refund excess .... ☐
20 Amount to apply if not entire overpayment .... ____________
21 Number of installments for estimated tax (1 - 4) .... ____________

Business Income and Expenses

GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

1 Check ownership ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**

2 Business name ____

3 a Business street address ____

b 1 City, State and Zip Code, **or** ____

2 Foreign country ____

4 Principal business/profession ____

5 Employer ID number ____

6 Business code **(Preparer Use Only)** ____

	Yes	No
7 Was this business fully disposed of in a fully taxable transaction during 2023 ?	☐	☐

8 Accounting method:
Cash ☐ Accrual ☐ Other (specify) ☐ ____

9 Method used to value closing inventory:
Cost ☐ Lower of cost or market ☐ Other (explain) ☐ ____

	Yes	No
10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory? (If yes, attach explanation)	☐	☐
11 Did you materially participate in the operation of this business during 2023 ?	☐	☐
12 Did you start or acquire this business during 2023 ?	☐	☐
13 a Did you make any payments in 2023 that require you to file Forms 1099?	☐	☐
b If yes, did you or will you file all the required Forms 1099?	☐	☐
14 At-risk determination:		
a Is all of the investment in this activity at risk?	☐	
b Is some of the investment in this activity not at risk?	☐	
15 Did you have unallowed passive losses in 2022 ?	☐	☐
16 a Treat all MACRS assets for this activity as qualified Indian reservation property?	☐	☐
b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? **Regular** ☐ **Extension** ☐ **No**		☐
c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	☐	☐
d Was this business located in a Qualified Disaster Area?	☐	☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022
17 Gross receipts or sales		
18 Returns and allowances plus other adjustments		
19 Other income (include federal/state gas tax credit/refund)		

COST OF GOODS SOLD – IF APPLICABLE	2023	2022
20 Inventory at beginning of year		
21 Purchases		
22 Items withdrawn for personal use		
23 Cost of labor (do not include your salary)		
24 Materials and supplies		
25 Other costs		
26 Inventory at end of year		

Business Income and Expenses (continued)

EXPENSES	2023	2022
Business name ______		
27 Advertising		
28 Car and truck expenses		
29 Commissions and fees		
30 Contract labor		
31 Depletion		
32 Depreciation and Section 179 deduction **(Preparer Use Only)**		
33 Employee benefit programs:		
a Employee health insurance premiums		
b Other employee benefit programs		
34 Insurance (other than health)		
35 Self-employed health insurance attributable to this business		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098		
b Other		
37 Legal and professional services		
38 Office expenses		
39 Pension and profit-sharing plans		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18)		
b Other business property		
41 Repairs and maintenance		
42 Supplies (not included in cost of goods sold)		
43 Taxes and licenses not reported to you on Form 1098		
44 Travel and meals		
a Travel		
b Meals subject to 50% limit		
c Meals subject to 80% limit		
d Meals not subject to limit		
45 Utilities		
46 Gross wages		
47 Other expenses:		
______		
______		
______		
______		
______		
______		
______		
______		
______		
48 Expenses for business use of your home **(Preparer Use Only)**		
Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs		
50 DPAD (line 6) from cooperative(s) with tax year beginning **before** Jan. 1, 2018		
51 DPAD (line 6) from cooperative(s) with tax year beginning **after** Dec. 31, 2017		

Medical and Tax Expenses

MEDICAL AND DENTAL EXPENSES	2023	2022
1 Prescription medications		
2 Health insurance premiums (enter Medicare B on ORG10)		
Exclude premiums paid through an exchange (Form 1095-A)		
3 Qualified long-term care premiums		
a Taxpayer's gross long-term care premiums		
b Spouse's gross long-term care premiums		
c Dependent's gross long-term care premiums		
4 Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity		
5 Insurance reimbursement		
6 Doctors, dentists, etc		
7 Hospitals, clinics, etc		
8 Lab and X-ray fees		
9 Expenses for qualified long-term care		
10 Eyeglasses and contact lenses		
11 Medical equipment and supplies		
12 Miles driven for medical purposes 01/01/2023 thru 12/31/2023		
13 Ambulance fees and other medical transportation costs		
14 Lodging		
15 Other medical and dental expenses:		
a		
b		
c		
d		
e		
f		
g		
h		
i		
j		

TAXES	2023	2022
Enter state and local income taxes on **ORG7, ORG8, ORG10,** and **ORG40.**		
16 Real estate taxes paid on principal residence		
17 Real estate taxes paid on additional homes or land		
18 Auto registration fees based on the value of the vehicle		
19 Other personal property taxes		
20 Other taxes:		

Noncash Contributions

	Name of Donee Organization	Check if Statement Exists for Gifts of $250 or More	Fair Market Value	Prior Year Fair Market Value
A				
B				
C				
D				
E				
F				
G				
H				
I				

Note: Complete sections below **only** if the **total** noncash contributions are **more than $500.**

	Description of Donated Property	Type**	Address of Donee Organization
A			
B			
C			
D			
E			
F			
G			
H			
I			

	Method for Fair Market Value*	Date of Contribution	Complete these columns **only** for each contribution over $500		
			Date Acquired (month, year)	How Acquired***	Your Cost
A					
B					
C					
D					
E					
F					
G					
H					
I					

***Methods of determining FMV:**

Appraisal
Average share
Catalog
Capitalization of income
Comparative sales
Consignment shop
Present value
Replacement cost
Reproduction cost
Thrift shop

****Type of Donated Property**

Household/clothing items
Motor vehicle, boat or airplane
Art, other than self-created
Art, self-created
Collectibles
Business equipment
Business inventory
Stock, publicly traded
Stock, other than publicly traded
Securities, other than stock
Intellectual property
Real property, conservation property
Real property, other than conservation
Other personal property
Other intangible property

*****How Property was Acquired:** Purchase, Gift, Inheritance, Exchange

Miscellaneous Itemized Deductions (FOR STATE USE ONLY)

MISCELLANEOUS DEDUCTIONS (2% LIMITATION)	2023	2022
Employee Business Expenses		
Note: If you have any travel, transportation, meal expenses **or** your employer reimbursed you for **any** of your job-related expenses, complete **ORG17** for **all** your employee expenses.		
1 Union and professional dues		
2 Professional subscriptions		
3 Uniforms and protective clothing		
4 Job search costs		
5 Other unreimbursed employee expenses:		
a		
b		
c		
d		
e		
Other Expenses Subject to the 2% Limitation		
Treat all MACRS assets for this activity as qualified Indian reservation property? ☐ Yes ☐ No		
Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ☐ Regular ☐ Extension ☐ No		
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ☐ Yes ☐ No		
Was this property located in a Qualified Disaster Area? ☐ Yes ☐ No		
Check to code assets as Investment Expense ☐		
6 Tax return preparation fees		
7 Investment counsel and advisory fees		
8 Certain attorney and accounting fees		
9 Safe deposit box rental		
10 IRA custodial fees		
11 a Government unemployment benefits repaid in **2023** ☐		
b Other expenses (list):		

OTHER MISCELLANEOUS DEDUCTIONS	2023	2022
12 Federal estate tax paid on income in respect of a decedent		
13 Amortizable bond premiums (acquired before 10/23/86)		
14 Gambling losses (to the extent of gambling income)		
15 Claim repayments		
16 Unrecovered investment in annuity		
17 Ordinary loss attributable to certain debt instruments		

Rent and Royalty Income and Expenses

BASIC PROPERTY INFORMATION

Property description: ______

Property type: * ______ If type is other, enter a description: ______

Location (street address): ______

City: ______ State: ___ Zip: ______

If a foreign address: Foreign province or state: ______

Foreign postal code: ______ Foreign Country: ______

Is this activity a qualified trade or business under Section 199A? .... ☐ Yes ☐ No

		Yes	No
1	Check property owner .... ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**		
2 a	Did you make any payments that would require you to file Form(s) 1099?	☐	☐
b	If **yes,** did you or will you file all required Forms(s) 1099?	☐	☐
3 a	Enter the ownership percentage (if not 100%)	______	
b	If not 100%, are you reporting 100% of the income and expenses?	☐	☐
4	Is this a rental property? (If **yes,** answer questions 5 through 11; if **no,** skip to question 12.)	☐	☐
5	Did you have personal use of this property or rent it for part of the year at less than fair rental value?	☐	☐
6	For all rental properties, **enter the number of days** during 2023 that:		
a	The property was rented at fair rental value	______	
b	The property was used personally or rented at less than fair rental value	______	
c	You owned the property, if not the entire year	______	
7 a	Does this rental have multiple living units and you live in one of the units?	☐	☐
b	If **yes,** enter percentage of rental use	______	
8	Did you actively participate in this property's management during 2023 ?	☐	☐
9	Did you materially participate in this property's management during 2023 ?	☐	☐
10	Do you want to treat this property as non-passive?	☐	☐
11	Did this property have unallowed passive losses in 2022 ?	☐	☐
12	Did you dispose of this property in a fully taxable transaction?	☐	☐
13	Check this box if some of this investment was **not** at-risk	☐	
14 a	Treat all MACRS assets for this activity as qualified Indian reservation property?	☐	☐
b	Treat all assets acquired after August 27, 2005 as qualified GO Zone property? .... **Regular** ☐ **Extension** ☐ **No** ☐		
c	Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	☐	☐
d	Was this activity located in a Qualified Disaster Area?	☐	☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022
15 Rents or royalties received		

*** Property Types:**

1	Single family residence	**5**	Land
2	Multi-family residence	**6**	Royalties
3	Vacation/short-term rental	**7**	Self-rental
4	Commercial	**8**	Other

Rent and Royalty Income and Expenses (continued)

EXPENSES	2023	2022
Property location		
16 Advertising		
17 a Automobile (complete ORG18 for autos)		
b Travel		
18 Cleaning and maintenance		
19 Commissions		
20 a Mortgage insurance premiums — qualified		
b Other insurance		
21 Legal and professional fees		
22 Management fees		
23 a Mortgage interest paid to banks — qualified		
b Mortgage interest paid to banks — other		
24 Other interest		
25 Repairs		
26 Supplies		
27 a Real estate taxes		
b Other taxes		
28 Utilities		
29 Other expenses:		
a		
b		
c		
d		
e		
30 a Depreciation and Section 179 deduction **(Preparer Use Only)**		
b Depletion **(Preparer Use Only)**		

Child and Dependent Care Expenses

CHILD AND DEPENDENT CARE EXPENSES

Enter below the persons or organizations who provided the child and dependent care.

First Name (if person) Last Name (if person) OR Provider Business Name Additional Business Name / Provider Phone	Provider Address	ID Number SSN on first line OR EIN on second line	Amount Paid
1	Care at above address? .... ☐	Tax-Exempt .. ► ☐	Foreign ...... ► ☐
2	Care at above address? .... ☐	Tax-Exempt .. ► ☐	Foreign ...... ► ☐
3	Care at above address? .... ☐	Tax-Exempt .. ► ☐	Foreign ...... ► ☐
4	Care at above address? .... ☐	Tax-Exempt .. ► ☐	Foreign ...... ► ☐

EXPENSES	2023	2022
1 Total employment taxes paid on wages for child care expenses		
2 Total expenses paid in 2023 but not incurred in 2023		
3 Total expenses incurred in 2023 but not paid in 2023		
4 Medical expenses paid for qualifying persons unable to care for themselves		

STUDENT/DISABLED PERSON INFORMATION FOR 2023	Taxpayer	Spouse
5 If taxpayer or spouse was a full-time student or disabled in 2023 , answer the following questions: a Number of months that taxpayer/spouse was a full-time student or disabled		
b Did taxpayer or spouse work and earn less than $250/$500 during the months entered on line 5a? If No, leave line 5b blank. If Yes, multiply the number of months working and earning less by either $250/$500 and enter that amount here		

Education Information

EDUCATION TUITION AND FEES

Attach all Form 1098-Ts and a list of your qualified expenses.

EDUCATOR EXPENSES	2023	2022
1 a Taxpayer educator expenses		
b Spouse educator expenses		

STUDENT LOAN INTEREST PAID

Student Loan Interest Reported on a 1098-E in 2023

2 a Enter detail below or total interest in Part 2b

Lender's Name	2023	2022

Total Student Loan Interest	2023	2022
2 b Enter the total interest paid on qualified student loans		

FORM 1099-Q

3 Enter 1099-Q detail below.

State Code	Name of Payer or Program	Gross Distribution Box 1	Earnings Box 2	* Type Box 5

* For the Type Code, enter the following:

P = Private Qualified Tuition Program
S = State Qualified Tuition Program
E = Coverdell ESA

State Information Worksheet

GENERAL INFORMATION

	Taxpayer	Spouse
1 Enter your state of residence		

2 Check the appropriate box if:

	Taxpayer	Spouse		
a Full year resident	☐	☐		
b Part year resident	☐	☐	Date of entry:	Date of exit:
c Nonresident	☐	☐		

3 Resident locality: ____________________

4 County: ____________ School district: ____________ School district number: ____________

	Taxpayer	Spouse
5 Check if disabled	☐	☐

STATE CREDITS

6 **Description/type of credit** (for example, solar energy, carpool)	Code	Amount
a		
b		
c		
d		
e		

VOLUNTARY STATE CONTRIBUTIONS

7 **Description/type of contribution** (for example, wildlife, cancer)	Code	Amount
a		
b		
c		
d		
e		

MISCELLANEOUS QUESTIONS

	Yes	No
8 Did you file a state return for 2022?	☐	☐
9 Do you want state forms and instructions sent to you next year?	☐	☐
10 Do you want any applicable penalty and interest calculated and added to the return?	☐	☐

11 How do you want your state refund (if any) applied?

a Refunded ☐ b Apply to 2024 estimates ☐ c Apply to 2024 taxes ☐

12 Additional state information: ____________________

Please complete, print, and then sign and date this Order Form.

I/we have enclosed the Tax Interview and our tax data.*

☑ A down-payment of $31 is enclosed. *We will charge your credit card, if indicated below, plus any additional amount due for your tax return.*
This down-payment will reduce the final amount due.
I/we do not ☐ *want electronic filing (there is a surcharge for paper returns).*

Check here ☐ ***if Federal Only Return***

Pre-payment is required.

Payment Method *(Do not send cash)*

☐ Check ☐ Money Order ■ Visa ☐ MasterCard

Credit Card Account Number ________________ CVV/CVC ☐

Name on Credit Card

First,MI ________________

Last ________________

Expiration Date ____/____

Billing Address for Credit Card

Number and street or P. O. Box, Apt No. City, town or post office, County, *State* Zipcode

My/our REFUND(s), if any, should be:

☐ Check: mailed to the address on the Tax Return.
■ Direct Deposit: use the account number on the check used for payment.
☐ Direct Deposit: use the account number on the enclosed VOIDED check.

My/our BALANCE(s) DUE, if any, should be Direct Debit on Date: ____/____

☐ Direct Debit: use the account number on the check used for payment.
☐ Direct Debit: use the account number onthe enclosed VOIDED check.

Mail all documents to: TFI, P O Box 6682, Albany, CA 94706
Voice: 408-625-7648 **FAX:** 408-638-0164 *Surety Bond #98452189*
Referrals are appreciated

Taxpayer/Spouse Signature ________________ Date: _/_ _/_

We will mail you a review copy of your return shortly after we receive your tax data and payment.

Tax Services Agreement

The purpose of this agreement is: to confirm and specify the terms of our service and to clarify the nature and extent of those services. By signing this order form you confirm: your (and your spouse's) acceptance of this agreement.

We will prepare your Federal and State income tax returns from the information you send to us. We are not auditors for the IRS; we will not audit or verify the data you submit to us. We may need to ask you for clarification of some of the data. Before your return is filed, we will provide you a copy of your return for your review.

You are responsible for: providing to us all of the data required for us to prepare complete and accurate tax returns for you. You represent that the data you supply to us are accurate and complete to the best of your knowledge. You should keep all the documents, canceled checks, and other data that form the basis of your tax return. You are responsible for your income tax returns; you should carefully review them before they are filed.

We will use our judgment to resolve: (1) questions where the tax law is unclear, or (2) questions where there may be conflicts between the taxing authority's interpretation of the law and other supportable positions. We plan to do reasonable research to support the positions we take in your income tax returns. Unless you instruct us to do otherwise: whenever possible, we will resolve such tax questions in your favor.

Tax authorities may pick your tax return for review. If penalties, interest, or additional taxes are assessed: you agree you are responsible for their payment and will not look to us for reimbursement. If you receive a letter from a tax authority regarding a return we prepared for you: we can help you prepare a response. However, we cannot represent you in: (1) an audit of your return or (2) a formal appeal of the tax authorities proposed adjustments to your return.