

# 2023 Tax Information

**Be sure to SAVE this checklist and any additional forms to your device before uploading them to me!**

## PART I: Personal Information

Yes No

Did your marital status change?

Were there any changes in who lives with you or may be a dependent?

Were you, your spouse, or any dependents the victim of identity theft?

Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?

If "Yes," please provide Notice CP01A from the IRS

## PART II: Dependents' Information

Yes No

Do you have any dependents? **If "No," skip to PART III**

Can another person qualify to claim any of your dependents?

Did you have any child care expenses?

Did you have any adoption expenses?

Did you have any children under age 19 or a full time student under age 24 with more than \$2,200 of **unearned** (i.e. investment or taxable scholarship) income?

**\* ALSO COMPLETE "2023 Dependent Information" \***

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## PART III: Education Information

Yes No

Did anyone in your household attend a post-secondary school during 2023?

Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent in 2023 (even if classes were attended in another year)?

**\* If "Yes," ALSO COMPLETE "2023 Education Credits" \***

#### PART IV: Health Care Information

Yes No

Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?

If "Yes," provide Form 1095-A

Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA?

If "Yes," was any of the amount distributed spent for non-medical expenses?

Did you make any contributions to an HSA or MSA outside of payroll deductions?

#### PART V: Income, Purchases, Sales, and Debt Information

Yes No

Did you receive any income or incur any expenses associated with freelancing (Upwork, TaskRabbit, Fiverr, etc.) or directly as a contractor? \*\*

Did you receive income or incur expenses associated with short term rentals (Airbnb, VRBO, or HomeAway, etc.), car sharing (Uber, Lyft, Turo, etc.), crowdfunding (Kickstarter, Indiegogo, GoFundMe, etc.), fashion sharing (Poshmark, thredUp, etc.) or a fantasy sports league? \*\*

At any time during the tax year, did you (a) receive (as a reward, award, or payment for property or service); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (If YES, you must provide a report showing disposals and cost basis in those disposals.)

Did you have any gambling winnings during the year?

Did you receive any tips not reported to your employer?

Did you receive any disability income during the year?

Did you cash in any U.S. Savings Bonds during the year?

Did you buy or sell any stocks, bonds, or other investments during the year?

Did you sell a principal residence during the year?

Did you abandon a principal residence or piece of real property during the year?

Did you receive any principal or interest during the year for property sold in prior years?

Did you have any debts cancelled or forgiven during the year?

Does anyone owe you money that has become uncollectible?

Did you receive any other income that you have not provided information for with this organizer or with your tax documents?

**PART VI: Retirement Information**    **\*\* ALSO COMPLETE "2023 Business Information"**

Yes    No

Did you receive any payments from, make any withdrawals from, or execute any rollovers from an IRA, Roth, Keough, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Did you receive any Social Security benefits?

Have you contributed to a traditional IRA for this year? If YES, how much?

Have you contributed to a Roth IRA for this year? If YES, how much?

**PART VII: Deduction Information**

Yes    No

Did you make cash (check, credit card, online) charitable contributions?

Did you make any non-cash charitable contributions during the year (clothes, furniture, vehicles, stocks and bonds, etc.)?

Did you pay out of pocket medical or dental expenses (after tax health care premiums, long term care premiums, prescriptions, co-pays, deductibles, mileage, etc.) in excess of 7.5% of your income?

Did you pay any real estate or personal property taxes?

Did you pay mortgage interest during the year?

Have you ever used mortgage/home equity loan proceeds for other than home repair or improvement (auto purchase, college, debt consolidation)?

Did you make any major purchases during the year (vehicle, boat, etc.)?

**PART VIII: Rental Property/Business Information**

Yes    No

Do you own any rental property, your own business, or have an interest in a partnership or S Corporation? **If "No," skip to PART IX**

Was the business or rental activity engaged in for profit?

Is the property rented at fair market value?

Did you sell, exchange, or purchase any real estate during the year?

Did you start a new business or purchase any rental property during the year?

Did you acquire a new or additional interest in a partnership or S Corp?

Did you purchase any business assets or convert any assets to business use?

Did you sell an existing business, rental property, or other business property?

Did you rent out your home or use it for business?

Did you pay health insurance premiums for your employees?

Did you pay any contractors \$600 or more during the year?

If "Yes," did you or will you file form(s) 1099-NEC by January 31, 2024?

If you are self-employed, have you contributed to a SEP or Simple IRA for this year?

If "No", will you contribute this year?

**\* ALSO COMPLETE "2023 Business Information" \***

#### PART IX: Foreign Tax Information

Yes No

Did you have a financial interest in or signature authority over a financial account, asset, or trust located in a foreign country?

Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

Did you receive a distribution from, or were you a grantor of, or transferor to a foreign trust?

Did you have any income from, pay any taxes to, or own property in a foreign country (other than investments in a US brokerage account)?

#### PART X: Miscellaneous Information

Yes No

Did you make any estimated payments toward your 2023 taxes?

Did you refinance your personal residence or other real property or take out a home equity loan during the year?

Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service

Did you purchase any goods or services online or out of state on which sales tax was not paid but that would be subject to sales tax in your state of residence?

Has the IRS disallowed or adjusted the Earned Income Credit on your tax return in any prior year?

Did you pay wages to any household employees (nanny, housekeeper, etc.)?

Did you make gifts to any one person in excess of \$15,000 during the year?

Did you make any energy efficient improvements to your main home during the year?

Do you want to have any refunds directly deposited to a different account than last year?

Do you want any balances due directly withdrawn from a different account than last year?

If you have an overpayment of 2023 tax, do you want the refund applied to your 2024 estimated taxes?

Did you receive any notices from the IRS or a state or local taxing authority that I haven't already seen?

Do you anticipate your income or withholdings to be different for 2024?

May the IRS discuss your tax return with your preparer? (This may make it possible for me to interface with taxing authorities without additional authorization)

Would you like a pdf copy of your tax return instead of receiving a paper copy?

## PART XI: Earned Income Credit

Yes No

Do you normally get the Earned Income Credit?

**\* ALSO COMPLETE "2023 EIC" \***

Please provide documentation and/or information for any "Yes" answers.

## Financial / Retirement Planning

Yes   No

Are you interested in retirement and financial planning?

Is retirement on your mind?

When do you plan to retire?

How much income will you need when you retire?

Do you have a retirement account?   Yes   No  
If Yes, how many accounts do you have?

What type of account is it? (Check all that apply):

401k	IRA	SEP	
403b	Roth	Pension	
457	Simple	SS	Other

What investments do you currently have (Check all that apply)

Stocks	Bonds	Mutual Funds
Annuities	CD's	