

2023	1040	US	Tax Organizer
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 Flagstaff, AZ 86001
 Telephone number: (928) 774-5086
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 E-mail address:

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

Address

Street address.....
 Apartment number.....
 City.....
 State.....
 ZIP code.....

DEPENDENTS

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

WAGES, SALARIES AND TIPS

Employer Name:

<input type="checkbox"/>	
<input type="checkbox"/>	

2023 Amount

2022 Amount

Attach Forms W-2

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Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

INTEREST INCOME

Payer Name:

2023 Amount	2022 Amount
Attach Forms 1099-INT	

DIVIDEND INCOME

Payer Name:

Attach Forms 1099-DIV	

PENSION AND IRA INCOME

Payer name:

Attach Forms 1099-R	

GAMBLING WINNINGS

Payer name:

Attach Forms W-2G	

Total gambling losses.....
Winnings not reported on Form W-2G.....

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history).....
- Form 1099-MISC - Miscellaneous income.....
- Form 1099-K - Merchant card and third party network payments.....
- Form 1099-S - Sales of real estate (also include closing statements).....
- Form 1099-G - State tax refunds.....

Attach Forms 1099

Attach Forms 1099	
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Taxpayer:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

Attach Forms 1099	

Spouse:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

Attach Forms 1099	

MISCELLANEOUS INCOME

Alimony received.....
Spouse: Alimony received.....

Other:

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RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

- Traditional IRA contributions (1=maximum)
Roth IRA contributions (1=maximum)
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns: 2023 Amount, 2022 Amount

Spouse:

- Traditional IRA contributions (1=maximum)
Roth IRA contributions (1=maximum)
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns: 2023 Amount, 2022 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest
Form 1098-T - Tuition and related expenses

Table with 2 columns: Attach Forms 1098, Amount

Affordable Care Act

- Form 1095-A - Health Insurance Marketplace Statement

Table with 2 columns: Attach Forms 1095, Amount

ADJUSTMENTS TO INCOME

Taxpayer:

- Self-employed health insurance premiums
Educator expenses
Expenses from rental of personal property

Table with 2 columns: 2023 Amount, 2022 Amount

Other adjustments to income:

Table with 2 columns: 2023 Amount, 2022 Amount

Alimony Paid - Recipient name & SSN

Table with 2 columns: 2023 Amount, 2022 Amount

Spouse:

- Self-employed health insurance premiums
Educator expenses
Expenses from rental of personal property

Table with 2 columns: 2023 Amount, 2022 Amount

Other adjustments to income:

Table with 2 columns: 2023 Amount, 2022 Amount

Alimony Paid - Recipient name & SSN

Table with 2 columns: 2023 Amount, 2022 Amount

MEDICAL AND DENTAL EXPENSES

- Prescription medicines and drugs
Doctors, dentists and nurses
Hospitals and nursing homes
Insurance premiums
Taxpayer: Long-term care premiums
Spouse: Long-term care premiums
Insurance reimbursements
Out-of-pocket lodging and transportation expenses
Number of medical miles

Table with 2 columns: 2023 Amount, 2022 Amount

Other:

Table with 2 columns: 2023 Amount, 2022 Amount

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MEDICAL AND DENTAL EXPENSES (Continued)

Other: [line] 2023 Amount 2022 Amount

TAXES PAID

Table with 2 columns: Description, 2023 Amount, 2022 Amount. Rows include State income taxes, City/local income taxes, State and local sales taxes, etc.

Other: [line] [line] 2023 Amount 2022 Amount

[checkbox] Personal property taxes (including automobile fees in some states)..... Attach Tax Notice

INTEREST PAID

Home mortgage interest and points paid [checkbox] Attach Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)

Points not reported on Form 1098

Investment interest (interest on margin accounts): Passive Interest.....

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

[line] [line] 2023 Amount 2022 Amount

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Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

CASH CONTRIBUTIONS (Continued)

Volunteer Expenses (out-of-pocket).....
Number of charitable miles.....

Table with 2 columns: 2023 Amount, 2022 Amount

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

Blank lines for non-cash contributions

Table with 2 columns: 2023 Amount, 2022 Amount

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....
Tax return preparation fee.....
Safe deposit box rental.....
Investment expenses.....
Estate tax, section 691(c).....

Table with 2 columns: 2023 Amount, 2022 Amount

Unreimbursed employee expenses:

Blank line for unreimbursed employee expenses

Table with 2 columns: 2023 Amount, 2022 Amount

Other:

Blank line for other miscellaneous deductions

Table with 2 columns: 2023 Amount, 2022 Amount

Please enter all pertinent 2023 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account		
1=electronic payment of balance due		
1=electronic payment of estimated tax		

BANK INFORMATION

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

2023 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid	Date Paid	TS	2023 Voucher Amount
Overpayment applied from 2022				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				
Former spouse SSN if joint estimates				

State

	Amount Paid	Date Paid	TS	2023 Voucher Amount
Overpayment applied from 2022				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				

1 **Type of Account**

1 = Savings
2 = Checking

2 **Type of Investment**

1 = Checking or savings (default)	6 = Coverdell savings account (ESA)
2 = Taxpayer's IRA (next year limits)	7 = Other
3 = Spouse's IRA (next year limits)	8 = Taxpayer's IRA (current year limits)
4 = Health savings account (HSA)	9 = Spouse's IRA (current year limits)
5 = Archer MSA	

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Direct Deposit & Estimates (Form 1040 ES) (cont.)

7.1

Please enter all pertinent 2023 information.

APPLICATION OF 2023 OVERPAYMENT (7.1)

If you have an overpayment of 2023 taxes, do you want the excess refunded? or applied to 2024 estimate?

Other (please explain): _____

2024 ESTIMATED TAX INFORMATION

Do you expect your 2024 taxable income to be different from 2023? Yes No

If "yes" explain any differences in income, deductions, dependents, etc.: _____

Do you expect your 2024 withholding to be different from 2023? Yes No

If "yes" explain any differences: _____

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