

Client Information Sheet for 2023 Tax Return

(please complete information on both sides of this sheet and include this worksheet with your tax paperwork)

Taxpayer: First name M.I.
 Last name Suffix

Spouse: M.I.
 Suffix

>>> Please be prepared to provide a copy of your drivers license or state ID card to help prevent a delay in your refund. <<<

Social security #

Date of birth

Date of death

Occupation

Email address

Home phone

Cell phone

Mailing address: Street Apt/Suite
 Zip code City State

Dependants: (Include your children under age 19 (or under age 24 if a full time student) who lived with you even if you are not claiming them as a dependant)

Claim as a dependant for 2023?	# of month lived with you in 2023?	First name	Initial	Last name	Social security number	Birthdate	Relationship
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

If you are due a refund, how do you want to receive it?
 Check sent to you in the mail
 Apply to next year's estimates
 Direct deposit*

If you owe taxes, how do you want to pay them?
 Paper check mailed to the IRS
 Credit card (extra fees may apply)
 Installment Agreement (extra fees may apply)
 Direct debit from my bank account*

*Please be able to provide a copy of a check or other verification for accounts used in direct deposit or direct debit:

Bank account: Checking Savings
 Bank Name: _____
 Routing Number: _____
 Account Number: _____

How would you like to receive your tax return:
 Paper copy
 picked up in office
 mailed to me (extra fees apply)
 Digital copy
 Uploaded to the portal
 I'll bring a flash drive

Amount spent on internet, mail order or other out of state purchases where sales tax was not paid: \$ _____

Do you have another person that you wish to authorize us to discuss your account with?
 Name: _____
 Phone Number: _____

Yes	No	Unsure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PERSONAL INFORMATION

Have you, your spouse or a dependent applied for or received an Identity Protection PIN from the IRS? (Include IPPIN notice letter)

Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?

Did you get married, legally separated or divorced in 2023? Date of occurrence: ____/____/2023

Did you purchase or sell your principal residence or did your address change? Date of Move: ____/____/____

Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?

Were either you or your spouse in the military or National Guard during 2023?

Did you make gifts totaling more than \$17,000 to any one person (including the cash value of gifts) in 2023?

Do you (or your spouse) have an ownership interest in an LLC?

Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?

(please complete information on both sides of this sheet and include this worksheet with your tax paperwork)

Name _____ Phone _____

Yes No Unsure

DEPENDENTS

- Are there any changes in your dependents from last year?
- Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
- Did you pay expenses for the care of your child or other dependent so you could work? (Provide **name, address, SSN/EIN and amount paid**)
- Did you pay post-secondary education expenses for your dependent children or yourself? (Include form(s) **1098-T**)
- Are all of your dependents either US residents or citizens?

Yes No Unsure

INCOME (In 2023, did you or your spouse have any of the following?)

- Wages? (include form(s) **W-2**)
- Did you receive any distributions from a retirement plan? (Include form(s) **1099-R**)
- Non-employee compensation? (include form(s) **1099-MISC** or **1099-NEC**)
- Did you receive a **1099-K** from a third-party network such as Paypal or Venmo?
- Interest or dividend income? (include form(s) **1099-INT**, **1099-DIV** or brokerage company's **consolidated 1099**)
- Gambling income? (include form(s) **W-2G**). Be sure to include any gambling expenses.
- Social security or Railroad Retirement benefits? (include form(s) **SSA-1099** or **RRB-1099**)
- Disability income? (include form(s) **W-2** or **1099**)
- Unemployment compensation? (include form(s) **1099-G**)
- Child Support** or **Alimony** received? Date of alimony agreement? ____/____/____
- Did you receive **tip income** NOT reported to your employer?
- Did you receive, or expect to receive, a Schedule **K-1** (or substitute K-1) from a trust, estate, partnership, or S corp?
- Did you start or acquire a new business or purchase new rental property in 2023? (provide details)
- Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) **1099-SA**)
- Did you sell any non-business items for more than the item cost you? (provide details)
- Did you have any debt cancelled or forgiven during 2023? (Include form(s) **1099-A** or **1099-C**)
- Did you receive any non-taxable sources of income? (provide details)
- Did you receive any income not reported in this Organizer? (provide details)

Yes No Unsure

FOREIGN REPORTING

- Did you have an interest in or signature authority over a financial account in a foreign country?
- Were you the grantor of or transferor to a foreign trust?
- Did you receive income from a foreign source or pay taxes to a foreign government?

Yes No Unsure

DEDUCTIONS

- Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you make any contributions to an HSA (Health Savings Account) in 2023? (Include form 5498-SA)
- Did you make any solar or geothermal energy efficient improvements to your home during 2023?
- Did you make energy efficient improvements to your home in 2023? (windows/doors, furnace, gas water heater, etc)
- Did you purchase a qualifying electric vehicle in 2023?
- Did you pay any student loan interest in 2023? (Include form 1098-E)
- Did you pay health insurance premiums directly (not through payroll deduction)?
- Did you make any contributions to a 529 education savings account?
- Did you acquire health insurance through the healthcare marketplace exchange? (Include form **1095-A**)
- Did you make any federal, state or local estimated tax payments for 2023?
- Did you pay alimony? Date the alimony agreement? ____/____/____ SSN of recipient? _____

Yes No Unsure

OTHER QUESTIONS

- At any time during 2023 did you receive, sell, send, exchange or other wise acquire any interest in virtual currency?
- Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
- Did you make gifts totaling more than \$17,000 to any one person (including the cash value of gifts) in 2023?
- Has your bank account information changed since you last filed a tax return?
- Have you included all of your income with this worksheet?
- Do you have documentation to support all deductions that you are claiming?
- Have you signed the Engagement Letter that came with this worksheet?

>>> Please provide copies of all tax related forms such as W2's, 1099's and documents to support deductions. <<<

To the best of my knowledge the enclosed information is correct and includes all income, deduction, and other information necessary for the preparation of this years income tax returns for which I have adequate records.	Sign: _____	Date: _____
---	-------------	-------------