



2023 Income Tax Organizer

I WANT MY REFUND(S) DIRECT DEPOSITED: YES ☐ NO ☐
(If YES, please enclose a blank check or provide bank information below)

Routing #: _____ Account #: _____

☐ No change from previous year.

Taxpayer (T) _____

Spouse (S) _____

Address: _____

Occupation (T) _____

Occupation (S) _____

Date of Birth (T) _____

Date of Birth (S) _____

Social Security # _____

Social Security # _____

School District _____

Preferred form of contact _____

Email (T) _____

Email (S) _____

Phone (T Cell) _____

Phone (S Cell) _____

Dependent's names (Exact spelling, SS# and dates of birth are mandatory). If claiming per divorce decree (and not the custodial parent) please include signed form 8332.

_____	SS# _____	Birth Date _____
_____	SS# _____	Birth Date _____
_____	SS# _____	Birth Date _____
_____	SS# _____	Birth Date _____

THIS SECTION MUST BE COMPLETED:

- 1) Do you possess documentation (i.e. birth certificate, SS Card) to substantiate eligibility to claim the child tax credit? Yes ____ No ____
- 2) Were any tax credits related to your dependents ever disallowed or reduced in a previous year? Yes ____ No ____
- 3) Is your dependent a citizen of the United States? Yes ____ No ____
- 4) In 2023, did you receive, sell, send, exchange, or otherwise acquire interest in virtual currency? Yes ____ No ____
- 5) Did you have financial interest in a foreign account or property in 2023? Yes ____ No ____
- 6) Did you or your spouse donate directly to a charity from your IRA? If YES \$ (TP) _____ (SP) _____
- 7) Did any family member purchase health Ins. from Health Ins. Exchange? Yes ____ No ____ (Include form 1095-A, if "Yes")

INCOME RECEIVED FOR CURRENT TAX YEAR

1. Income from wages (Form(s) W-2)
2. Interest income (Form(s) 1099 INT)
3. Dividend income (Form(s) 1099 DIV)
4. Retirement Distributions (Form(s) 1099 R)
5. Income from unemployment (Form 1099 G)
6. Social Security income (Form(s) SSA 1099)
7. Gain/Loss on sale of investments (Form 1099-B, Consolidated form 1099, Form 1099-S/closing statement if sale of real estate)
8. Income and expenses related to rental properties (separated by property)
9. Income & expenses related to self-employment income, including farm activities (bring 1099's received)
10. Alimony received/(paid) in current year \$ _____ Original Divorce Date _____
11. Gambling income (W2-G and any winnings that are not on Form W-2G)
12. Federal and state tax paid or refunded in 2023, related to 2022 or prior: Fed \$ _____ State \$ _____

ESTIMATED TAX PAYMENTS

FEDERAL:

Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____

STATE:

Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____
Date Paid _____	Amount Paid \$ _____

CONTINUED ON BACK

MEDICAL EXPENSES

Misc Medical (co-pays, etc) \$ _____
 Medical Ins Premiums \$ _____
 Medicare Part B Premiums \$ _____
 T - Long Term Care Ins Prem \$ _____
 S - Long Term Care Ins Prem \$ _____
 Medical Miles # _____

Did you have distributions from an HSA in 2023? **If YES**

Please bring forms 1099 SA to your appointment

TAXES

Real Estate – Principal Residence \$ _____
 Real Estate – Second Residence \$ _____
 Real Estate – Other \$ _____
 Auto Registration Fees \$ _____
 Sales Tax PD on Auto/Boat etc. \$ _____

INTEREST EXPENSE

Home Mortgage Interest

_____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____

Home Equity Interest

_____ \$ _____
 _____ \$ _____

OTHER DEDUCTIONS

Investment Int Expense \$ _____

Student Loan Int \$ _____

Attach 1098-E

Educator (Teacher Costs) \$ _____

ROTH IRA CONTRIBUTIONS

(T) \$ _____ (S) \$ _____

TRADITIONAL IRA CONTRIBUTIONS

(T) \$ _____ (S) \$ _____

GAMBLING LOSSES \$ _____

CHARITABLE CONTRIBUTIONS (For Cash Gifts Over \$250 Written Acknowledgement is Required for all others you must have receipts or cancelled checks)

_____ \$ _____

_____ \$ _____

Non-Cash Contributions \$ _____

Travel Expense for Charitable Work \$ _____

(Number of Miles) # _____

CHILD CARE EXPENSES (required even if using employer sponsored Dependent Care Benefit)

Provider Name _____

SSN/EIN# _____

Address: _____

Amount Paid \$ _____

Provider Name _____

SSN/EIN # _____

Address: _____

Amount Paid \$ _____

IOWA TUITION AND TEXTBOOK CREDIT

(25% of the first \$2000 in tuition, textbook and extracurricular expense for each K thru 12 dependent)

Amount Paid \$ _____

Did you receive ESA funding (private schools)

COLLEGE TUITION COSTS

All 1098-T's (per college) will be required.

Check box each year dependent attended college

	Dependent 1	Dependent 2	Dependent 3
2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2021	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2022	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2023	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

College Savings- IA 529 Plan Contributions (2023):

Taxpayer

Spouse

Dependent 1:

Dependent 2:

Dependent 3:

Dependent 4:

College Savings – IA 529 Plan Distributions (2023):

Bring form 1099-Q and qualified expenses not reported on form 1098-T.

Taxpayer Signature _____

PLEASE TYPE NAME IN TO "SIGN"

Spouse Signature _____

PLEASE TYPE NAME IN TO "SIGN"