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**Please complete this organizer and call our office for an appointment or send us your information.
 You can also call our office to request a customized electronic organizer.**

INDIVIDUAL TAX INFORMATION ORGANIZER FOR 2023 RETURN

Personal Information - *If you are a new client, please provide copies of last year's tax return.*

Taxpayer		Social Security Number	Identity Protection Pin
First Name	Last Name		Birthdate
Address	Home Phone ()		Occupation
City, State Zip	Cell/Work ()		Email Address
Driver's License Number	State	Issue Date	Expiration Date
Are you Legally Blind? Yes No	Permanently disabled? Yes No		

Spouse		Social Security Number	Identity Protection Pin
First Name	Last Name		Birthdate
Address	Home Phone ()		Occupation
City, State Zip	Cell/Work ()		Email Address
Driver's License Number	State	Issue Date	Expiration Date
Are you Legally Blind? Yes No	Permanently disabled? Yes No		

Filing status: **Single** **Married filing jointly** **Married filing separately** **Widow(er)** **Head of household** **Registered Domestic Partnership**
 Did/have you celebrate(d) marriage to a same-sex spouse in a state that legally recognized same-sex marriage? **Yes No**
 Were you divorced or separated during the year? **Yes No** Were there any deaths in the family? **Yes No**

Names of dependent children <i>First and Last Name</i>	Social Security #	Date of birth	Relationship	Months lived in home in 2023	College Student	Care expenses paid
	- -					
	- -					
	- -					
	- -					
	- -					
	- -					

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent or the child will claim themselves? **Yes No**
 Are any children disabled? **Yes No** Did any children have unearned income above \$1,300 for the year for filing requirements? **Yes No**

Other dependents or people who lived with you <i>First and Last Name</i>	Social Security #	Date of birth	Relationship	Months lived In home in 2023	Income
	- -				
	- -				
	- -				

Direct Deposit/Electronic Funds Withdrawal Information

Bank Information: Use for Direct Deposit of Refund/ Direct Debit of Balance Due

Name of bank

Checking Savings	Routing transit number	Account number
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Ask your tax preparer for information about depositing a refund into an IRA account, or splitting the deposit into more than one account.

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information for the preparation of this year's income tax returns for which I have adequate records. Please provide a copy of your (and your spouses, if applicable) driver's license (front and back). This information may be needed to electronically file your tax return.

Taxpayer Signature	Date
Spouse Signature	Date

MISCELLANEOUS INFORMATION (CONTINUED)	Yes	No	Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.
	Yes	No	Would you like the IRS and State to discuss your tax return with your tax preparer if any questions should arise?
	Yes	No	Are you a member of the Military?
	Yes	No	Has your will or trust been updated in the last three years?

State Information

Full-year resident	Part-year resident	Non-resident
States of residence during 2023:	Dates:	
School District:	Did you own or rent your home?	Own Rent
Are you or your spouse a veteran with a service-connected disability?	Yes No	% %
Are you or your spouse a "resident tribal member" of a federally recognized Indian Tribe?	Yes No	If yes, what tribe?
Contributions made to:	<i>Michigan Education Trust</i>	<i>Michigan Education Savings Plan (MESP) Including MI 529 Advisor Plan (MAP)</i>
Payments made in 2023	\$	\$
Did you purchase tangible personal property items that you did not pay Michigan sales tax on?	Yes No	
<i>If yes, what was purchased and how much was spent including shipping and handling?</i>		\$

Quarterly Tax Estimates Paid – Federal and State

	Federal		State	
	<i>Date paid</i>	<i>Amount</i>	<i>Date paid</i>	<i>Amount</i>
1 st quarter 2023		\$		\$
2 nd quarter 2023		\$		\$
3 rd quarter 2023		\$		\$
4 th quarter 2023		\$		\$
Other:		\$		\$
Other:		\$		\$
TOTAL estimates paid for 2023		\$		\$

For **2024**, do you want to receive a payment reminder by text (cellphones only)? **Yes** **No**

Income Information

Please bring in all supporting documentation such as W-2's, 1099's, 1095 from Marketplace healthcare, K-1's from employers, partnerships, S corporations, estates and trusts, brokerage houses, mutual funds, banks and credit unions, etc. for the following:

- | | |
|---|--|
| <ul style="list-style-type: none"> • Wages, salaries, and tips • Interest income • Tax-exempt interest income received (attach year-end statement) • Dividends • Stock sales • Retirement income including pensions and IRA's * • Debt Forgiveness | <ul style="list-style-type: none"> • Annuities • Unemployment compensation (Form 1099-G) • Social Security (attach Social Security report Form SSA-1099) • Railroad retirement • State income tax refund • Gambling winnings |
|---|--|

Please provide a total amount for (if applicable):

Public assistance	\$	Strike benefits	\$
Prizes/award	\$	Scholarships	\$
Education grants	\$	Tips/gratuities not reported on W-2	\$
Veterans' disability	\$	Workers' compensation	\$
Bartering	\$	Other	\$
Alimony received	\$		

If any of the following apply, please attach detail of receipts and expenditures. (Contact us if you need additional help)

- | | |
|--|---|
| <ul style="list-style-type: none"> • Business (Schedule C) • Rental (Schedule E) including type of property and full address | <ul style="list-style-type: none"> • Farm (Schedule F) |
|--|---|

Installment sale payments received on a previously reported transaction

Interest \$	Principal \$	Payor	Social security #
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Sales and Exchange Worksheet – Please bring 1099’s you received

Provide information about sales of stock, real estate or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description	Purchase date	Cost	Selling date	Sale price
		\$		\$
		\$		\$
		\$		\$
		\$		\$

*We need exact purchase and sale dates and cost including reinvestments, if applicable, to determine the capital gain rate which applies. Electronic spreadsheets can be imported into our tax package. Your statements from your broker (Form 1099-B) sometimes provide the cost/basis information necessary to compute gain or loss. **If the statement does not contain this information, you must provide it.***

Other Adjustment/Credits Retirement Plans

IRA Maximum \$6,500 for 2023 (additional \$1,000 if 50 years or older)

Traditional or Roth IRA (indicate which):	Date made	Amount
Taxpayer		\$
Spouse		\$
If amount listed is not the maximum, do you want to contribute the maximum? Yes No		
Did you make a retirement plan rollover to a traditional or Roth IRA in 2023? Yes No If yes, amount: \$		
Do you or your spouse actively participate in an employer plan? Self: Yes No Spouse: Yes No		
Did you make contributions for a self-employed SEP, Simple and/or qualified plan? Yes No If yes, amount: \$		

Some contributions for 2023 can be made in 2024

Child Care Credit

Child care expenses paid to allow parent to work or go to school (please estimate for each child):

The following information is needed for each provider in order to claim the credit/totals should agree to dependent totals:

Provider name	Provider name
Address	Address
Social security or ID number	Social security or ID number
TOTAL PAID \$	TOTAL PAID \$

Amount you elected to defer through your payroll to a cafeteria or flex plan for child care in 2023 – *should agree to W-2 box 10* | \$

Higher Education Deductions and/or Credits

Qualified tuition and course fees paid for student attending eligible education institutions post high school. Please attach your **tuition settlement statements and 1098T’s**. We need the institutions EIN, name and address.

Yes	No	Were any children attending college?	Year in college	Paid by You: Tuition \$	Student loan interest \$	Books \$
				Paid by student: Tuition \$	Student loan interest \$	Books \$
<i>Other expenses:</i>						
Yes	No	Did you pay any tuition for a private school for a dependent child or take classes yourself?				
		Student				Amount paid \$
Name and address of school						

Qualified Student Loan Interest Paid in 2023 for you, spouse or dependent *\$2,500 Maximum per year – Income Limits Apply*

Name	Amount \$	Taxpayer	Spouse	Dependent
Education Savings Account (ESA) - <i>maximum \$2,000 for 2023</i>				
Contributions made in 2023	\$	Distributions received in 2023		\$

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$300 each (\$600 joint)	\$
Are you covered by a Health Savings Account (HSA)? Amount of deductible contributions	\$
Self-employed SEP, Simple, and qualified plans. Some contributions for 2023 may be made in 2024.	\$
Self-employed health insurance deduction. (Sole proprietors)	\$
Penalty on early withdrawal of savings.	\$
Moving expenses. Job-related move and at least a 50-mile increase in commuting distance. ARMED FORCES ONLY	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer

Questions & Concerns to Be Addressed During the Preparation of Your Tax Return:

Itemized Deductions paid during 2023

Deductions must generally exceed \$13,850 for single; \$27,700 for MFJ; \$20,800 HOH; or \$13,850 MFS to be a benefit.

Medical – Must exceed 7.5% of AGI

Prescription medicines and drugs	\$	Doctor, dentist, etc.	\$
Medical insurance premiums paid	\$	Hospitals/Nursing Home fees	\$
Medicare insurance paid (SSA-1099)	\$	Lab fees/X rays	\$
Long-term care insurance premiums	Taxpayer \$	Eyeglasses and contacts	\$
	Spouse \$	Hearing aids	\$
Ambulance	\$	Medical Supplies	\$
Number of medical miles: @ 22.0 cents per mile			
Lodging - limit of \$50 per day per person \$			
Total insurance and HSA reimbursement if not netted in above figures			\$

Taxes – Do not include taxes paid for full or partial business or rental-use property.

<i>Real estate taxes on personal residence:</i>		Amount	Date paid
Taxable value of residence	Township/City	\$	
2022 Winter		\$	
2023 Summer		\$	
2023 Winter		\$	
Other real estate taxes on land, camp, etc.:		\$	
Licenses fees on vehicles		\$	
Yes No	Did you keep receipts for sales tax paid during 2023?	Amount \$	
Yes No	Did you purchase a car, plane, boat, motorcycle or home in 2023?		
Sales tax paid \$		Purchase paid \$	Date / /

Interest Expense

<i>Principal residence and one vacation residence (boat or recreational vehicle with living accommodations)</i>			
House mortgage paid to financial institution (attach Form 1098 received from lender)		\$	
Home equity or home improvement loan		\$	
House mortgage or contract paid to an individual:		\$	
Name	Social Security #		
Address			
New mortgage or refinance?	For how many payments?	Date	/ /

Points Paid

If you refinanced a mortgage or purchased a new residence – please bring in closing papers	\$
<u>Investment Interest</u> - i.e., on debt to carry stocks, bonds or investments:	
List:	\$

Charitable

Cash to church and charities *		\$	
Noncash contribution - Fair market value of items given		\$	
<i>If over \$500, provide details of contributions. Items must be in good used condition or better</i>			
Out-of-pocket expenses for charities		\$	
Charitable miles (14 cents per mile)			
Did you or your spouse make a contribution from an IRA directly to a charitable organization? Yes No			

** Current tax law requires taxpayers to have the following for all tax deductions to a charitable contribution of cash, check, or any other monetary gift: (1) a bank record or (2) a written communication from the charity that adequately documents the donation. If the donation is \$250 or more, you must have the appropriate written communications from the charity.*

Casualty and Theft Loss

If you suffered any sudden, unexpected damage or loss of property or theft, provide details to your preparer. (Federally declared disaster area only)

Miscellaneous Deductions

<i>Attach detail if applicable:</i> Were any expenses reimbursed by your employer Yes No	
Gambling losses (Deductible only up to the amount of gambling winning reported. A log must be kept to verify losses.)	\$
	\$