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PERSONAL INCOME TAX ORGANIZER - TAX YEAR 2023

Please fill out this organizer as completely as possible as it is designed to help you find all of the deductions you are entitled to on your tax return.

GENERAL INFORMATION

Name _____ Social Security # _____
Address _____
City, State, Zip _____ County or City _____
Date of Birth _____ Occupation _____
Phone Numbers Home _____ Cell _____
Email _____ Can we text you with questions? _____

Phone Numbers Work _____ Home _____
Cell _____ E-mail _____

Spouse's Name _____ Social Security # _____
Address _____
City, State, Zip _____
Date of Birth _____ Occupation _____
Phone Numbers Home _____ Cell _____
Email _____ Can we text you with questions? _____

FILING STATUS (check one)

Single Married Filing Jointly Surviving Widow(er) with dependent child
 Unmarried Head of Household Married Filing Separately (If MFS) List Spouse's Name & SSN
Name _____ SSN _____

DEPENDENTS (for tax purposes)

Children (all children must have a SSN; please indicate "B" for boy or "G" for girl)

Name & Relationship	Social Security #	(DOB) Date of Birth	Live With You? Yes or No
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

FORM 1095-A: HEALTH INSURANCE MARKETPLACE

If you or your family received advance payments of the Premium Tax Credit through the Health Insurance Marketplace in 2023, please attach Form 1095-A (Health Insurance Marketplace Statement).
(We must have this form in order to prepare your taxes.)

INCOME

Number of attached W-2 forms for Taxpayer _____ Spouse _____

DIGITAL ASSETS / VIRTUAL CURRENCY

During 2023, did you receive, sell, exchange, gift or dispose of any digital assets? Yes No
(This is now a question on the income tax return and must be answered)

INTEREST RECEIVED (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Payer	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

DIVIDENDS RECEIVED (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Payer	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

SALE OF STOCKS OR OTHER PROPERTY (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Description	*Date Purchased	*Cost	Date Sold	Sale Price
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

*We need this information for each stock you sold. This should be on your brokerage statement.

RENTAL INCOME AND EXPENSES *

Rents Received _____ **Property Address** _____

Expenses Real Estate Taxes _____ Mortgage Interest _____ Utilities _____
Supplies _____ Repairs _____ Insurance _____
Auto Mileage _____ Other (describe) _____
Improvements (describe) _____

Include your closing statement (HUD 1) if you purchased, sold or re-financed the property during 2023.

*Please attach additional sheets for other rental properties.

SOCIAL SECURITY AND PENSIONS

Please attach forms SSA 1099 for Social Security and forms 1099 R for pension or retirement benefits.

STANDARD DEDUCTION AMOUNTS FOR 2023

(You can automatically deduct these amounts if you cannot itemize)

Married Filing Jointly \$27,700
Head of Household \$20,800
Single \$13,850

DEDUCTIONS AND CREDIT ITEMS

ESTIMATED TAXES PAID FOR TAX YEAR 2023 (not balance due from 2022)

	Federal	State
Overpayment Applied from Prior Year	_____	_____
	Amount Paid	Amount Paid
1 st Qtr.	_____	_____
2 nd Qtr.	_____	_____
3 rd Qtr.	_____	_____
4 th Qtr.	_____	_____

IRA OR SEP CONTRIBUTIONS

Taxpayer Amount _____ Date _____ Type _____
Spouse Amount _____ Date _____ Type _____

MEDICAL EXPENSES (Amounts for which you were not reimbursed; if you can itemize)

Insurance premiums _____ Prescriptions _____ Eyeglasses _____
Doctors _____ Dentists _____ Hospitals _____ Other _____
Medical mileage _____ Long Term Care Premiums _____

TAXES PAID (if you can itemize)

Real Estate taxes _____ Personal Property taxes _____
State tax paid for last year's return _____
Other taxes paid _____

INTEREST EXPENSES (if you can itemize)

Home mortgage – interest paid to Financial Institutions _____ Points paid _____
Home mortgage – interest paid to Individual _____ Recipient's SSN _____
Investment interest _____

CONTRIBUTIONS (Only deductible if you can itemize)

Cash and check (for which you have receipts) _____
Description of donated property for which you have receipts _____

Donated to what organization? _____ Address _____
Original Cost of Donated Property _____
Charitable Activity Mileage _____
Other _____

EDUCATION, TUITION (AOTC & LIFETIME LEARNING) & STUDENT LOAN INTEREST

Expenses for qualified higher education (tuition & enrollment fees) _____ (attach Form 1098-T)
Student's name _____
What year of Higher Education? (please circle) 1 2 3 4 5+
Student loan interest paid during 2023 _____ (attach 1098-E Statement)

CHILD CARE EXPENSES

Name of provider	Address	Fed. ID#	Amount Paid
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OTHER

We recommend electronic filing for all returns. If you are due a refund, would you like to have the IRS deposit your refund directly into your checking account? If so, please enter your account number and routing number (or attach a voided check).

_____ Routing Number _____ Account Number _____

MISC. INFO

Any additional income for 2023? If yes, please list amount and description:

Questions or notes for preparer?

*****Please remember to enclose W-2s, 1099's, mortgage interest statements, etc.*****

Please do NOT text pictures of tax documents to us; they are very difficult to read.

Thank you for your business. We look forward to working with you.

You do not need an appointment to drop off your taxes.

Please visit our website at www.StaffordTaxAdvisors.com