## **General Information** Taxpayer Spouse First Name . . . . . . . Middle Initial . . . . . . . Last Name . . . . . . . Suffix . . . . . . . . . . . . Social Security Number . . . Date of Birth . . . . . . . Date of Death . . . . . Check ("X") which phone number to list on return. Home Phone . . . . . . Work Phone . . . . . . . . Cell Phone . . . . . . . . . . Fax Number . . . . . . . Legally Blind . . . . . . . Totally Disabled . . . . . . Claimed as a Dependent . . . Presidential Election Fund (\$3) Occupation . . . . . . . . E-mail address . . . . . . State of Residence as of 12/31 . . County of Residence as of 12/31. School District as of 12/31 . . Sales tax rate of locality in 2023 . If Part Year, Period of Residency . to Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster. ID type . . . . . . . . . . Driver's license OR State Issued ID Driver's license OR ID number . . . . . . . . . . ID issuing state . . . . . . . . . . . \_\_\_\_\_ ID expiration date . Filing Status Status on 2022 return: Status as of 12/31/2023: Single Enter ("X") in the box 2 Married filing joint 3 Married filing separately (Enter spouse's name and SSN above) Head of Household Non-dependent name: Non-dependent SSN: \_\_\_\_ 5 Qualifying surviving spouse (QSS) Year spouse died Taxpayer's Address Apt/Suite : Street State City Zip Code If address is in a foreign country, enter that country . . . Foreign postal code Foreign province/county . . \_\_\_\_ If a bona fide resident of a U.S. territory, enter territory . . **Preparer's Information** Preparer's name Firm's name Street **Attestation and Signature:** To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. Sign Date

here

		Name 55N				
		Questions				
		Questions				
Yes						
$\vdash$		Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?  Did you purchase or sell your principal residence or did your address change?				
$\vdash$	$\begin{array}{c} 2 \\ 3 \end{array}$	Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?				
$\vdash$		Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2023?				
	5	Were either you or your spouse in the military or National Guard?				
	6	Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?				
	7	Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?				
<u> </u>						
Yes	No	<u>Dependents</u>				
	1	Are there any changes in your dependents from last year?				
	2	Did you have any children under 19 (or 24 if a full time student) who received more than \$1,250 in investment income?				
	3	Did you pay education expenses for your dependent children?				
	<u></u> 4 −	Did anyone in your family receive a scholarship of any kind during 2023?				
$\vdash$	5	Did you pay any dependent care expenses for a child or a parent?				
$\vdash$	$\frac{6}{7}$	Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?  Are all of your dependents either US residents or citizens?				
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Vaa	No	Hoolth Care Coverage				
Yes	No 1	Health Care Coverage  Did you or a member of your family have minimum essential coverage in 2023? (The entity that provided the coverage				
Ш	ш'	may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled				
		in minimum essential coverage and shows their months of coverage.)				
Yes	No	Income (In 2023, did you or your spouse have any of the following?)				
Ϊ́	1	Wages? (include form(s) W-2)				
	2	Non-employee compensation? (include form(s) 1099-NEC)				
	3	Miscellaneous Income? (include form(s) 1099-MISC)				
	4	Interest income? (include form(s) 1099-INT)				
	5	Dividend income? (include form(s) 1099-DIV)				
	<u>6</u>	Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?				
$\vdash$	<b>⊢</b> 7	Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.				
$\vdash$	8 9	Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099)  Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G)				
		Disability income? (include form(s) W-2 or 1099)				
	11	Unemployment compensation? (include form(s) 1099-G)				
	12	Alimony?				
	13	Did you receive tip income NOT reported to your employer?				
	14	Did you receive payments from a Long-Term Care insurance contract?				
	15	Did you barter your services for goods or services from someone else?				
$\square$	16	Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?				
	17	Did you receive employer-provided adoption benefits for a previous year?				
$\vdash$	18 19	Did you cash in any U.S. savings bonds?  Did you make a loan to someone at an interest rate below market rate?				
$\overline{}$	20	Did you receive a housing allowance for ministerial services you provided?				
	21	Did you receive any income not reported in this Organizer?				
	22	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?				
	23	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?				
	<del>_</del>					
Yes	No	Foreign Reporting				
	1	Did you have an interest in or signature authority over a financial account in a foreign country?				
	2	Were you the grantor of or transferor to a foreign trust?				
	3	Did you receive income from a foreign source or pay taxes to a foreign government?				
Yes	No	Retirement & Other Plans				
$\vdash$		Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)				
H	2 3	Did you rollover a retirement plan distribution into another plan?  Did you convert a traditional IRA to a Roth IRA?				
H	<b> </b>	Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?				
H	5	Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?				
	6	Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA)				
	7	Did you make any contributions to an HSA (Health Savings Account) in 2023?				
	8	Did you receive a qualified disaster distribution in 2023?				
	9	Did you receive an early distribution for a qualified birth or adoption distribution?				

Yes	No	Purchases, Sales, Gains and Losses		
	1	Did you exchange any securities or investments for something other than cash?		
	2	Do you have any short sales, commodity sales, or straddles?		
	3	Did you receive Form 2439?		
	4	Did you buy or sell any bonds?		
	5	Did you receive stock from a stock bonus plan with your employer?		
	6	Did you sell any other personal assets at a gain?		
	7	Did you sell any real estate (other than your home) during the year?		
	8	Did you sell any assets using the installment method?		
	9	Did you receive proceeds from a prior year installment sale?		
	10	Did you purchase a rental property?		
	11	Did you exchange any property for other property?		
	12	Did you incur a loss because of damaged or stolen property?		
	13	Did you purchase a new vehicle, aircraft or boat?		
	14	Did any security become worthless during 2023?		
	15	Did any debts become uncollectible during 2023?		
	16	Did you puchase any items acquired out of state, online or by mail order that did not include sales tax?		
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Yes	No	Business and Rental Property Income & Deductions		
		If you own rental property, do you qualify as a Real Estate Professional?		
		Did you start or acquire a new business?		
	] 3	Did you sell any part of an existing business, or sell business assets?		
	<b>⊢</b> 4 ₅	Did you cease operating any business or rental property?		
	<sup>5</sup>	Did you remove any of your business assets for personal use?		
	<b>⊢</b> 6 7	Did you use part of your home for business purposes?		
	<b>⊢</b> 7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2023?		
	8	Do you pay for any health or long term care insurance through your business?		
	9	If you or your spouse are self-employed, are either of you covered under an employer's health plan?		
	11	Did you purchase any furniture or equipment for your business?  Did you make any improvements to your rental properties?		
	12	Did you receive income from raising animals or crops?		
	'I2	blu you receive income nom raising animals of crops:		
Yes	No .	Other Deductions		
	$H^{1}$	Did you use your car on the job (other than to and from work)?		
	<u></u> 2	Did you work out of town for part of the year?		
	3	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?		
	<b>⊢</b> 4 −	Did you incur any travel and entertainment expenses for business purposes?		
	<b>⊢</b> 5	Did you pay expenses for the care of your child or other dependent so you could work?		
	<b>⊢</b>	Did you purchase a 'clean fuel' or electric hybrid vehicle in 2023?		
	<b>⊢</b> 7	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023?		
	8	Did you contribute less than an entire interest in any property to charity?		
	9	Did you refinance a mortgage or take out a home equity loan during 2023?		
$\vdash$	10	Did you incur moving expenses during the year due to a military order and incident to a permanent change in station?		
$\vdash$	11	Did you or your spouse pay any educational expenses for yourselves?  Did you pay any student loan interest?		
$\vdash$	12	Did you make any federal or state estimated payments?		
$\vdash$	13	Did you make any lederal or state estimated payments?  Did you pay alimony?		
	15	Did you donate non-cash donations?		
	16	Did you donate a vehicle?		
	3	,		
V	NI a	Missallaneaus		
Yes	No 1	Miscellaneous  Did you make gifte of more than \$17,000 to any one person?		
$\vdash$	$H_{2}^{1}$	Did you make gifts of more than \$17,000 to any one person?		
$\vdash$	2 2	Did you engage the service of any household employees?		
$\vdash$	$\begin{bmatrix} 3 \\ 4 \end{bmatrix}$	Did your bank account information change within the last twelve months?		
$\vdash$	<b>⊢</b>	Do you want to allocate \$3 to the Presidential Election Campaign Fund?		
$\vdash$	<b>⊢</b> 5	Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?		
$\vdash$	<b>⊢</b>   6	Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2023?  Did you claim a First-time Homebuyer Credit for a home purchased in 2008?		
$\vdash$	7 8	Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?		
	<u></u>	was there a disposition of change in use of your main nome for which you daillied the Flist-time nomebuyer Cledit?		

Yes	No 1 2	Return preparation and filing Do you want to e-file your return? If you are due a refund, how do you want to rece	eive it?			
		Check sent to you in the mail		Other quick re	efund via a bank pr	oduct
		Apply to next year's estimates				
		Direct deposit (please provide voided b	lank check)	Type of account:	Checking	Savings
		If you owe taxes, how do you want to pay them?	?			
		Paper check sent with my return	Credit card	Installment Aç	greement	
		Direct debit (please provide a voided bl	ank check)	Type of account:	Checking	Savings
	3	Do you want to allow your tax preparer to discuss this year's return with the IRS? If no, enter another person (if desired) to be allowed to discuss this return with the IRS:				
		Designee's	Phone		Personal identifi	cation
		name	Number		_ Number (5 digit	PIN)

Name	SSN
Comments	