

Tax Organizer For 2023 Income Tax Return

Prepared For:

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Prepared By:

**FAMILY TAX & FINANCIAL SERVICES
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This Tax Organizer can be used to help identify information needed to prepare your 2023 income tax return. Enter your 2023 tax information and if additional space is required, enclose a separate sheet with the details. If available, your prior year information has been included for reference.

Please return this Tax Organizer along with all Forms W-2, 1099, and any other relevant information that will assist in the accurate preparation of your 2023 income tax return.

If you have any questions, please feel free to contact us at (765)464-1680 or (765)543-7573.

PERSONAL INFORMATION ORGANIZER
Please complete this Organizer before your appointment.

1. PERSONAL INFORMATION

Name		SSN or ITIN		Date of Birth	Date of Death	Occupation	Blind	Disabled
Taxpayer							<input type="checkbox"/>	<input type="checkbox"/>
Spouse							<input type="checkbox"/>	<input type="checkbox"/>
Street Address		Apt.	City or town		State	Zip Code	County	
Foreign country		Foreign province/state				Foreign postal code		
E-mail Address(es)				Home Phone		Mobile Phone		
Spouse's E-mail Address(es)				Spouse's Mobile Phone				

2. FILING STATUS

- ☒ Single ☐ Check if parent (or someone else) can claim you as a dependent on their return.
☐ Married Filing Joint
☐ Married Filing Separate ☐ Check if you lived apart from your spouse for all of 2023.
☐ Head of Household
☐ Qualifying Widow(er) Year spouse died: _____

3. DEPENDENTS

Name	Relationship	Date of Birth	SSN or ITIN	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income	Child Care Expenses Paid
					<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"/>		

4. REFUND INFORMATION

1. Would you like to have any refunds directly deposited into your bank account? ☐ Yes ☐ No

Bank Account

Ownership ☐ Taxpayer ☐ Spouse ☐ Joint
 Type ☐ Checking ☐ Savings
 Bank name _____
 Routing number _____
 Account number _____
 Account outside the jurisdiction of the United States? ☐ Yes

Bank Account

Ownership ☐ Taxpayer ☐ Spouse ☐ Joint
 Type ☐ Checking ☐ Savings
 Bank name _____
 Routing number _____
 Account number _____
 Account outside the jurisdiction of the United States? ☐ Yes

5. IDENTIFICATION INFORMATION

Taxpayer

Type of ID: ☐ Driver's license ☐ State-issued ID
 ☐ No ID
 ID number _____
 Location of issuance _____
 Issue date _____
 Expiration date _____

Spouse

Type of ID: ☐ Driver's license ☐ State-issued ID
 ☐ No ID
 ID number _____
 Location of issuance _____
 Issue date _____
 Expiration date _____

PERSONAL INFORMATION ORGANIZER

Please complete this Organizer before your appointment.

6. HEALTH CARE INFORMATION

Please indicate where you received your health insurance from for all members of your tax household.

☐ Government-Sponsored Marketplace☐ Private Exchange (Individual Insurance Company)

7. MISCELLANEOUS PERSONAL INFORMATION QUESTIONS

- | | | |
|--|-----------------------------------|---------------------------------|
| 1. Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund. | <input type="checkbox"/> Taxpayer | <input type="checkbox"/> Spouse |
| 2. Were you a victim of identity theft and have you been contacted by the IRS? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If Yes, please furnish the 6-digit PIN issued to you by the IRS | | |
| 3. Were you (or your spouse if filing jointly) a nonresident alien for any part of 2023? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Have you received any notices or correspondences from the IRS or state in the past 3 tax years? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Do you have any children age 18 or under (or student under age 24) who had unearned income of more than \$2,500? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7. Did you give a gift of more than \$17,000 to one or more people? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 8. If age 65 or older, do you want to file Form 1040-SR, U.S. Tax Return for Seniors, instead of Form 1040? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

8. COMMENTS

[illegible]

INCOME ORGANIZER

Please complete this Organizer before your appointment.
Business, Farm and Rental and Royalty Income or Loss Organizers are on separate pages.

1. WAGE AND SALARY INFORMATION

Attach W-2s:

Employer Name	Taxpayer	Spouse
_____	<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"/>

Unreported tip income received: _____

2. INTEREST AND DIVIDEND INCOME

Attach 1099-INT, 1099-DIV or other statements

Payer Name	Taxpayer	Spouse
_____	<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"/>

3. RETIREMENT DISTRIBUTIONS

Attach 1099-R & 5498

Payer Name	Roth IRA	Other IRA	Taxpayer	Spouse
_____	<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"/>

Attach SSA 1099 or RRB 1099

	Yes	No
Did you receive social security benefits?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive railroad retirement benefits?	<input type="checkbox"/>	<input type="checkbox"/>

4. SCHEDULE K-1 INCOME (1065, 1120-S AND 1041)

Attach K-1s:

Payer Name	Taxpayer	Spouse
_____	<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"/>

5. CAPITAL GAINS AND LOSSES

Attach 1099-Bs:

Payer Name	Taxpayer	Spouse
_____	<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"/>

6. OTHER INCOME

Description	Amount
State income tax refund	_____
Alimony received	_____
Date of original divorce/separation agreement	_____
Unemployment compensation	_____
Gambling winnings	_____
Jury pay	_____
Hobby income	_____
Scholarships (grants)	_____
NOL Carryforward	_____
Child support	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

7. MISCELLANEOUS INCOME QUESTIONS

1. Did you sell your home? ☐ Yes ☐ No
2. Did you earn any foreign income or pay any foreign taxes? ☐ Yes ☐ No
3. Do you have a health savings account (HSA), Archer MSA or Medicare Advantage (MA) MSA? ☐ Yes ☐ No
4. Did you have a financial account in a foreign country (i.e. bank account, securities account, etc.)? ☐ Yes ☐ No
If Yes, did the aggregate value of all financial accounts exceed \$10,000 at any time during 2023? ☐ Yes ☐ No
5. Did you have any debt forgiven (i.e. student loans, home mortgage, etc.)? ☐ Yes ☐ No
6. At any time during 2023, did you:
(a) receive (as a reward, award, or compensation) _____
(b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? ☐ Yes ☐ No

BUSINESS INCOME AND EXPENSES (Schedule C)

Indicate the owner of this business: ☐ Taxpayer ☐ Spouse ☐ Joint

Business Name: _____

Business product or service: _____

Business Address: _____

City, State, and Zip Code: _____

Did you start or acquire this business during 2023? ☐ Yes ☐ No

Accounting Method: ☐ Cash ☐ Accrual ☐ Other (describe) _____

Method used to value inventory: ☐ Cost ☐ Lower of cost or market ☐ Other (describe) _____

Income and Cost of Goods Sold	2023 Amount	2022 Amount
Gross receipts or sales		
Returns and allowances		
Other income (enclose description).		
Inventory at beginning of year.		
Purchases less cost of items withdrawn for personal use.		
Cost of labor		
Materials and supplies		
Other costs		
Inventory at end of year.		

Expenses	2023 Amount	2022 Amount		2023 Amount	2022 Amount
Advertising			Wages		
Commissions and fees			Energy efficient commercial bldgs deduction.		
Contract labor.			Other: _____		
Depletion					
Employee benefits.					
Insurance (other than health)					
Mortgage interest					
Other interest.					
Legal and professional fees					
Office expenses					
Pension and profit sharing . .					
Rent - Vehicle, machinery . .					
Rent - Other.					
Repairs and maintenance . .					
Supplies.					
Taxes and licenses					
Travel					
Meals and entertainment. . .					
Utilities.					

Vehicle Information

Vehicle description _____ Date placed in service _____ Cost or basis _____

Business miles _____ Commuting miles _____ Other miles _____

Actual expenses such as gas, oil, repairs, etc _____ Parking fees and tolls _____

Sales, Purchases, and Disposition of Assets in 2023 (New clients, enclose detailed listing of all depreciable assets.)				
Asset description	Date acquired	Purchase price	Date sold	Sales Price

Business Use of Home

Area used exclusively for business _____ Total area of home _____

Was the home used as a day care facility? ☐ Yes ☐ No Date home placed in service _____

Casualty losses _____ Insurance _____ Rent _____

Mortgage interest _____ Repairs and maintenance _____ FMV of home _____

Real estate taxes paid _____ Utilities and other expenses _____ Value of land _____

Carryover of unallowed expenses to 2023 ☐ Yes ☐ No (if yes, enter amount) _____

PROFIT OR LOSS FROM FARMING (Schedule F)

Indicate the owner of this farm: ☐ Taxpayer ☐ Spouse ☐ Joint

Principal product

Accounting Method: ☐ Cash ☐ Accrual

Did you materially participate in the operation of this farm during 2023? ☐ Yes ☐ No

Income	2023 Amount	2022 Amount
Sales of livestock and other items bought for resale.		
Cost of livestock and other items bought for resale		
Sales of livestock, produce, grains, and other products you raised		
Cooperative distributions		
Agricultural program payments		
Commodity Credit Corporation (CCC) loans reported under election.		
Commodity Credit Corporation (CCC) loans forfeited.		
Crop insurance proceeds and disaster payments received in 2022.		
Custom hire.		
Other income.		
Inventory of livestock, produce, etc. at beginning of year (accrual method only). . .		
Cost of livestock, produce, etc. purchased during year (accrual method only) . . .		
Inventory of livestock, produce, etc. at end of year (accrual method only)		

Expenses	2023 Amount	2022 Amount		2023 Amount	2022 Amount
Chemicals.			Seeds and plants purchased		
Conservation			Storage and warehousing. .		
Custom hire.			Supplies purchased		
Employee benefits.			Taxes.		
Feed purchased			Utilities.		
Fertilizers and lime.			Veterinary and breeding . .		
Freight and trucking			Other _____		
Gasoline, fuel, and oil.			_____		
Insurance			_____		
Mortgage interest			_____		
Other interest.			_____		
Labor hired			_____		
Pension and profit-sharing . .			_____		
Vehicles and machinery rent			_____		
Other rentals			_____		
Repairs and maintenance. . .					

Vehicle Information

Vehicle description _____ Date placed in service _____ Cost or basis _____

Business miles _____ Commuting miles _____ Other miles _____

Actual expenses such as gas, oil, repairs, etc. _____ Parking fees and tolls _____

Sales, Purchases, and Disposition of Assets in 2023

(New clients, enclose detailed listing of all depreciable assets.)

[illegible]

RENTAL AND ROYALTY INCOME AND EXPENSES (Schedule E, pg 1)Indicate the owner of this property: ☐ Taxpayer ☐ Spouse ☐ Joint

Description of property _____

Location of property _____

Did you or your family use this property during the tax year for personal purposes for more than the greater of: (a) 14 days, or (b) 10% of the total days rented at fair market value? ☐ Yes ☐ NoDid you meet the Active Participation requirements for this property? ☐ Yes ☐ No

(To meet these requirements, you must have participated in making management decisions or arranged for others to provide services in a significant and bona fide sense. Such management decisions include approving new tenants, deciding on rental terms, approving repair expenditures, or other similar decisions)

Was this property fully disposed of during 2023? ☐ Yes ☐ No

Income	2023 Amount	2022 Amount
Rents received		
Royalties received		

Expenses	2023 Amount	2022 Amount
Advertising		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and other professional fees		
Management fees		
Mortgage interest paid to banks		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Other _____		

Amortization		
Section 481(a) adjustment		

Vehicle Information

Vehicle description _____ Date placed in service _____ Cost or basis _____

Business miles _____ Commuting miles _____ Other miles _____

Actual expenses such as gas, oil, repairs, etc _____ Parking fees and tolls _____

Travel expenses _____

Sales, Purchases, and Disposition of Assets in 2023

(New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales price

DEDUCTIONS ORGANIZER

Please complete this Organizer before your appointment.
Itemized Deduction Organizers are on separate pages.

1. EDUCATION

Attach 1098-Ts, 1098-E's and 1099-Q's:

Student Name	Educational Institution	Fr	So	Jr	Sr	Oth	Tuition & Fees	Student Loan Interest Paid	Books, Supplies & Equipment	529 Plan
		<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"/>

2. JOB-RELATED MOVING EXPENSES

Description	Amount
Lodging	_____
Gas and Oil.	_____
Mileage	_____
Other	_____
Miles from old home to your new workplace	_____
Miles from old home to old workplace	_____
Member of the Armed Forces?	<input type="checkbox"/> Yes <input type="checkbox"/> No

3. IRA CONTRIBUTIONS

Description	Amount
Contributions to a Traditional IRA.	_____
Contributions to a ROTH IRA.	_____

4. OTHER DEDUCTIONS

Description	Amount
Educator expenses.	_____
Alimony paid Rec. SSN: _____ Date of original divorce/separation _____	_____
Health Savings Account contributions	_____
Archer Medical Savings Account contributions	_____
Jury duty repayment to employer	_____
Foreign qualified housing expenses.	_____
Contributions to College 529 Savings Plan. .	_____
Qualified business net (loss) carryover from 2022	_____
Qualified REIT dividends and PTP net (loss) carryover	_____
_____	_____
_____	_____
_____	_____

5. MISCELLANEOUS DEDUCTION QUESTIONS

1. Did you purchase an item(s) during 2023 for which you paid a large amount of sales tax? ☐ Yes ☐ No
2. Did you refinance a mortgage during 2023? ☐ Yes ☐ No

[illegible]

ITEMIZED DEDUCTIONS (continued)**Casualty and Theft Losses** (for property damaged by storm, water, fire, accident, or theft)*Enclose supporting documentation of what is written here, i.e. insurance reimbursement, receipts for cost of repairs.**(If additional losses were incurred, please attach a separate sheet of paper with these details.)*

Location of property: _____ Residential property ☐ Business property ☐
Description of property: _____ Federal Disaster ☐
Date of loss: _____ FEMA disaster declaration # _____

Amount of damage _____ Cost basis of property _____ Repair Costs _____
Insurance reimbursement _____ FMV of property before loss _____ Other _____
Federal monies received _____ FMV of property after loss _____ Other _____

Unreimbursed Employee Business Expenses*(if any depreciable assets were sold (including the vehicle), please see worksheet below)*

Dues (related to job) _____
Subscriptions related to your work _____
Licenses and regulatory fees _____
Tools and supplies used in your work _____
Work clothes, uniforms if required _____
Medical exams required by your employer _____
Work related education (books, tuition) _____
Legal fees related to your job _____
Job search expenses (current occupation) _____

***In home office:**

Total square footage _____
Office square footage _____
Office square footage _____
Rent _____
Insurance _____
Utilities _____
Repairs/Maintenance _____

Vehicle Information

Vehicle description _____
Date placed in service _____
Cost or basis _____

Miles of vehicle

Business miles _____
Commuting miles _____
Other miles _____

Expenses

Actual expenses _____
(gas, oil, repairs, etc)
Parking fees and tolls _____
Travel expenses _____

Questions relating to mortgage interest, taxes, and casualty losses were asked previously*Sales, Purchases, and Disposition of Assets in 2023***(New clients, enclose detailed listing of all depreciable assets.)*

T S	Asset description	Date acquired	Purchase price	Date sold	Sales price

Investment Related Expenses

Tax preparation fees _____
Safe deposit box _____
Custodial, trust admin fees _____
Fees to collect interest and dividends _____
Tax advice not related to investment income _____
Legal fees related to producing taxable income _____
Other _____
Other _____
Other _____

Other Misc. Deductions

Gambling losses _____
Estate tax deduction *(in respect of a decedent)* _____
Portfolio from Schedule K-1 _____
Unrecovered investment in a pension _____
Amortizable premium on taxable bonds _____
Disabled persons work expenses _____
Other _____
Other _____
Other _____

CREDITS AND PAYMENTS ORGANIZER

Please complete this Organizer before your appointment.

1. CHILD CARE CREDIT

Attach Daycare Provider Statement(s): Care Provider Name Address		Tax-Exempt	Telephone Number	Identification Number	Amount Paid
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____

2. RESIDENTIAL ENERGY CREDIT

Solar electric property	_____	Metal or asphalt roof	_____
Solar water heating	_____	Exterior windows and skylights	_____
Small wind energy	_____	Electric heat pump or central air conditioner	_____
Geothermal heat pump	_____	Natural gas, propane or oil water heater	_____
Fuel cell property	_____	Biomass fuel stove	_____
Insulation material	_____	Natural gas, propane or oil furnace	_____
Exterior doors	_____	Advanced main air circulating fan	_____
<p>1. Were the qualified improvements for your main home in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>2. Were any of the improvements related to the construction of this main home? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>			

3. MISCELLANEOUS CREDIT QUESTIONS

1. Did you pay any expenses related to the adoption of an eligible child?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Are you currently repaying the First-Time Homebuyer Credit?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Do you (and your spouse) have a social security number that allows you to work and is valid?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Were you issued a Mortgage Credit Certificate (MCC) by a state or local governmental unit or agency?	<input type="checkbox"/> Yes <input type="checkbox"/> No

4. ESTIMATED TAX PAYMENTS

Federal estimated payments		Date Paid	Amount Paid
Applied from 2022 federal refund		_____	_____
1st quarter payment		_____	_____
2nd quarter payment		_____	_____
3rd quarter payment		_____	_____
4th quarter payment		_____	_____
State estimated payments		Date Paid	Amount Paid
Applied from 2022 state refund _____		_____	_____
1st quarter payment		_____	_____
2nd quarter payment		_____	_____
3rd quarter payment		_____	_____
4th quarter payment		_____	_____
State Name		_____	_____
Local estimated payments		Date Paid	Amount Paid
Applied from 2022 local refund _____		_____	_____
1st quarter payment		_____	_____
2nd quarter payment		_____	_____
3rd quarter payment		_____	_____
4th quarter payment		_____	_____
Locality Name		_____	_____