ORGANIZER Page 1 2023 1040 US **Tax Organizer Tax Return Appointment Ziptax** 855 Industrial St Date: Redding CA 96002 Time: Telephone number: 530-223-3748 Location: Fax number: 530-223-7499 E-mail address: APPOINTMENTS@ZIPTAXREDDING.COM This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please enter all pertinent 2023 information. NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement. NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement. CLIENT INFORMATION Taxpayer First name and initial.... Last name........ Title/suffix..... Social security number... Occupation..... Date of birth (m/d/y).... Date of death (m/d/y).... 1=blind..... Home phone...... Work phone..... Work extension..... Cell phone...... E-mail address..... In care of..... Street address..... Apartment number. Address City. State..... ZIP code...... **DEPENDENTS** Dependent No. Dependent No. First name..... Last name..... Title/suffix...... Date of birth (m/d/y).... Date of death (m/d/y) Date of adoption (m/d/y) . Social security number... Relationship..... Months lived at home.... Dependent No. Dependent No. First name..... Last name....... Title/suffix..... Date of birth (m/d/y).... Date of death (m/d/y) Date of adoption (m/d/y) .

Social security number...
Relationship.....
Months lived at home....

ORGANIZER Page 2

	1040	US	Tax Or	ganizer					
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ORGANIZER Page 3 Tax Organizer 1040 US 2023 MISCELLANEOUS INCOME Taxpayer: Alimony received Spouse: Alimony received Other: **RETIREMENT PLAN CONTRIBUTIONS** 2023 Amount 2022 Amount Taxpaver: Traditional IRA contributions (1=maximum)

	Roth IRA contributions (1=maximum)		
	Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)		
Spouse:	Traditional IRA contributions (1=maximum)		
	Roth IRA contributions (1=maximum)		
	Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)		
	GOVERNMENT FORMS - DEDUCTIONS		
Form	1098-E - Student Ioan interest	Attach Forms 1098	
Form	1098-T - Tuition and related expenses	Attach Forms 1030	
AFFOR	DABLE CARE ACT		1
Form	1095-A - Health Insurance Marketplace Statement	Attach Forms 1095	
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ORGANIZER Page 4

Tax Organizer US 1040 2023 **TAXES PAID (continued)** 2023 Amount 2022 Amount State income taxes - paid with 2022 state extension State income taxes - paid with 2022 state return State income taxes - paid for prior years and/or to other states City/local income taxes - 1/23 payment on 2022 city/local estimate City/local income taxes - paid with 2022 city/local extension City/local income taxes - paid with 2022 city/local return Use taxes paid on 2023 purchases Use taxes paid on 2022 state return Sales taxes paid on boats, aircraft, and other special items Foreign income taxes..... **Attach Tax Notice** Personal property taxes (including automobile fees in some states) **INTEREST PAID** Home mortgage interest and points paid: Attach Forms 1098 Home mortgage interest not on Form 1098 (include name, SSN, & address of payee): Points not reported on Form 1098: Investment interest (interest on margin accounts): CASH CONTRIBUTIONS NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s). NONCASH CONTRIBUTIONS NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied. **MISCELLANEOUS DEDUCTIONS** Safe deposit box rental..... Investment expenses Estate tax, section 691(c)..... Unreimbursed employee expenses: Other: