

2023
TAX ORGANIZER

PLEASE USE THIS FORM TO ASSIST WITH GATHERING OF INFORMATION FOR YOUR 2023 TAX RETURN

Taxpayer Name: _____
Taxpayer Dob: _____
Spouse Name: _____
Spouse Dob: _____

Address: _____

City, Village or Town: _____
State: _____ ZIP: _____
County: _____

Telephone #: _____

Dependents	SS#	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____

Direct deposit of refund: ___ Yes ___ No
Bank Name: _____
Bank Routing Number: _____
Account Number: _____
Savings ___ Checking ___

Do you rent: ___ Yes ___ No
Rent paid: _____
___ With heat ___ Without heat

Tuition Expense:

Name	Amount	Yr	School
_____	_____	___	_____
_____	_____	___	_____
_____	_____	___	_____

Pension Contributions (other than at work):

IRA – taxpayer _____
IRA – spouse _____
Roth IRA – taxpayer _____
Roth IRA – spouse _____

Educator expenses: _____

Itemized Deductions:

Medical:

Doctors _____ Hospitals _____
Medications _____ Glasses _____
Hearing aids _____ Mileage _____
Other _____

Taxes paid:

Real Estate:
Home _____ Cottage _____
Personal property taxes _____

Interest paid:

Mortgage: Lender	Amount
_____	_____
_____	_____
_____	_____

Donations: (must have receipt or cancelled check or both)

_____	_____
_____	_____
_____	_____
_____	_____

Non cash contributions:

_____	_____
_____	_____

Gambling winnings _____

Unemployment _____

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W2's

Enclose all W-2's from each employer or Form 1099 if you were a sub-contractor

Interest income

Enclose all 1099's received for interest earned

Dividend income

Enclose all 1099's or broker statements for all dividends and stock transactions for the year

Stock sales

Enclose all 1099 B forms received reporting the sale of stocks

Pension plan withdrawals

Enclose all 1099-R's received for pension distributions received

Social Security Received

Taxpayer _____ Spouse _____

K-1's

Rental income

Other income not listed above

Jury pay _____
Tribal payments _____

Do you have an HSA through your Employer? _____

HSA Contribution you paid other than by deduction from your paycheck
