

Individual Tax Organizer

Personal Information

You:

First name	Last name	Social Security Number			
Date of Birth	Occupation				
Phone Number	Email Address				
Marital Status:	Single	Married	Divorced	Legally separated	Widowed

Spouse:

First name	Last name	Social Security Number
Date of Birth	Occupation	
Phone Number	Email Address	

Mailing Address:

Address	City	State	Zip code
Did your address change?	Yes	No	Date changed

Dependents

Dependent 1:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$4,400)	Number of Months Resided in Home				
Was a full-time college student?	Yes	No	Did file his/her own return?	Yes	No

Dependent 2:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$4,400)	Number of Months Resided in Home				
Was a full-time college student?	Yes	No	Did file his/her own return?	Yes	No

Dependent 3:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$4,400)	Number of Months Resided in Home				
Did file his/her own return?	Yes	No	Was a full-time college student?	Yes	No

Dependent 4:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$4,400)	Number of Months Resided in Home				
Did file his/her own return?	Yes	No	Was a full-time college student?	Yes	No

Income Sources

Work Income

Had a Job (W-2)

Self-Employed (1099-NEC, 1099-MISC, 1099-K)

Investment & Savings

Brokerage Accounts (1099-B, Brokerage Statement)

Interest Income (1099-INT)

Dividend Income (1099-DIV)

Exercised Incentive Stock Options (Form 3921)

Sold Real Estate (1099-S)

Less Common Investment & Savings

Received 1099-OID

Undistributed Capital Gains (Form 2439)

Foreign Accounts

Retirement Plans and Social Security

IRA, 401k, Pension Plan Withdrawals (1099-R)

Amount transferred to charity - QCD

Social Security Benefits (SSA-1099)

Rentals, Royalties, and Farm

Rental Properties & Royalties (1099-MISC)

Farm Income & Rental

Other Income

Unemployment & Government Payments (1099-G)

Received K-1

HSA/MSA Withdrawal (1099-SA)

Gambling Winnings (W-2G)

Amount not reported on W-2G

Received Alimony

Amount of Alimony

Date of Divorce or Separation

Jury Duty

Amount Received

Amount Repaid to Employer

Sold Main Home (gain or loss)

Date Purchased

Purchase Amount

Other Expenses

Home Foreclosure or Debt Cancellation (1099-A, 1099-C)

529 Plan or Coverdell ESA Withdrawal (1099-Q)

Other

Deductions and Credits

Home

Home Loan Interest (Form 1098)

Property Taxes

Main Home

Additional Homes

Family

Child Care Credit

1. Child's Name

Daycare Name

Daycare Provider SSN/EIN

Daycare Address

Total Amount Paid

2. Child's Name

Daycare Name

Daycare Provider SSN/EIN

Daycare Address

Total Amount Paid

3. Child's Name

Daycare Name

Daycare Provider SSN/EIN

Daycare Address

Total Amount Paid

Adoption Credit

Child's Name

Birth Year

SSN, ATIN, or ITIN

Adoption Expenses

Does child have special needs?

Yes

No

Is child a U.S. citizen?

Yes

No

Paid Alimony

Recipient's Name

Recipient's SSN

Alimony Amount

Date of Divorce/Separation

Charitable Donations

Cash/Check Donations

Total Amount Donated

Non-Cash Donations

1. Organization Name

Organization Address

Description

Date of Contribution

Donation Value

Cost Basis

Date Acquired

2. Organization Name

Organization Address

Description

Date of Contribution

Donation Value

Cost Basis

Date Acquired

Retirement

Retirement Contributions

Traditional IRA

Amount converted to Roth IRA

Roth IRA

SEP

Solo 401(k)

Deductions and Credits (Continued)

Education and Work

College Tuition & Expenses (1098-T)		
Cost of Supplies (purchased at school)	Cost of Supplies (purchased elsewhere)	
Did you receive financial aid not reported on a 1098-T?	Yes	No
Student Loan Interest (1098-E)		
Educator Expenses		
Amount Spent		

Vehicles & Personal Property

Major Purchases		
1. Description	Sales Tax Paid	
2. Description	Sales Tax Paid	
Car Registration Fees		
1. Make & Model	Amount	
2. Make & Model	Amount	
Casualties and Thefts		
Description of Event	Date	
Property Lost or Damaged	Cost	

Energy Efficiency Credits

Home Energy Credits			
Exterior Doors	Exterior Windows	Metal/Asphalt Roof	
Insulation	Building Property	Furnace Fan	
Furnace/Water Boiler	Solar Heating	Wind Energy Property	
Heat Pump	Fuel Cell Property	Fuel Cell Capacity	
Energy Efficient Vehicles			
Make	Model	Year	
VIN	Date Purchased	Credit Amount	
Energy Efficient Charging Station			
Cost			

Medical

Contributions to HSA/MSA (Form 5498-SA)		
Amount		
Medical & Dental Expenses		
Medical Professionals	Prescription Drugs	Labs and X-rays
Medical Facilities	Medical Supplies	Glasses & Contacts
Medical & Dental Ins.	LTC Ins. (You)	LTC Ins. (Spouse)
Travel Expenses	No. of Miles Traveled	Other
Affordable Care Act (1095-A)		

Self Employment Worksheet

Work Description

Type of Work	Business Name
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Income

1099-NEC

1099-MISC

1099-K

Cash and Checks Amount Earned in Cash and Checks

Expenses

Advertising	Commissions and Fees
Business Insurance	Interest - Mortgage
Interest - Other	Legal & Professional Fees
Office Expenses	Rent - Vehicles, Equipment, etc.
Rent - Business Property	Repairs & Maintenance
Supplies	Taxes & Licenses
Business Travel	Business Meals
Utilities	Inventory
Bank Charges	Dues & Subscriptions
Telephone	Miscellaneous

Labor:

Contract Labor Expenses	Did you pay any contractor \$600+?	Yes	No
Did you have any employees?	Yes	No	Wages Paid

Vehicle:

Make & Model	Date Purchased/Leased
Miles Driven (work and personal)	Miles Driven (work only)
Parking & Toll Expenses	Other Vehicle Expenses

Depreciable Assets:

1. Description	Date Purchased	Cost
2. Description	Date Purchased	Cost

Home Office:

Square Footage of Home Office	Square Footage of Entire Home
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Other Expenses:

1. Description	Cost
2. Description	Cost
3. Description	Cost

Rental Property Worksheet

Property #1

Address	City		State		Zip code
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Property #2

Address	City		State		Zip code
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Rental Property Worksheet (Continued)

Property #3

Address	City		State		Zip code
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Property #4

Address	City		State		Zip code
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Foreign Accounts Worksheet

Account #1:

Name of Foreign Bank	Address	
Account Type	Account Number	
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)	
Maximum Value (Include Currency)	End Year Balance (Include Currency)	
Is the account owned jointly?	Yes	No

Account #2:

Name of Foreign Bank	Address	
Account Type	Account Number	
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)	
Maximum Value (Include Currency)	End Year Balance (Include Currency)	
Is the account owned jointly?	Yes	No

Account #3:

Name of Foreign Bank	Address	
Account Type	Account Number	
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)	
Maximum Value (Include Currency)	End Year Balance (Include Currency)	
Is the account owned jointly?	Yes	No

Account #4:

Name of Foreign Bank	Address	
Account Type	Account Number	
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)	
Maximum Value (Include Currency)	End Year Balance (Include Currency)	
Is the account owned jointly?	Yes	No

Account #5:

Name of Foreign Bank	Address	
Account Type	Account Number	
Date Account Opened (if in 2023)	Date Account Closed (if in 2023)	
Maximum Value (Include Currency)	End Year Balance (Include Currency)	
Is the account owned jointly?	Yes	No

Additional Questions

Estimated Taxes Paid:

	Federal Taxes	State Taxes	Local Taxes
1st Quarter (Apr 2022)			
2nd Quarter (Jun 2022)			
3rd Quarter (Sep 2022)			
4th Quarter (Jan 2023)			

Direct Deposit & Electronic Payment:

If you're entitled to a refund, would you like to receive it as a direct deposit? Yes No

Bank Name

Account Type

Routing Number

Account Number

Notes Relating to Income Received:

Other Questions or Concerns: