

2023	1040	US	Tax Organizer
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Lori Di Marco, CPA, PLLC**31 Oak Street, Suite 3****Patchogue NY 11772**Telephone number: **6315630111**

Fax number:

E-mail address:

Tax Return Appointment

Date:

Time:

Location:

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

Spouse

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		

Address

In care of

Street address

Apartment number . . .

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		

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MISCELLANEOUS INCOME

Taxpayer: Alimony received

Spouse: Alimony received

Other:

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: 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)

2023 Amount	2022 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS☐ Form 1098-E - Student loan interest☐ Form 1098-T - Tuition and related expenses**Attach Forms 1098****AFFORDABLE CARE ACT**☐ Form 1095-A - Health Insurance Marketplace Statement**Attach Forms 1095****ADJUSTMENTS TO INCOME**

Taxpayer:

Self-employed health insurance premiums

Educator expenses

Other adjustments to income:

Alimony paid - Recipient name & SSN

Spouse:

Self-employed health insurance premiums

Educator expenses

Other adjustments to income:

Alimony paid - Recipient name & SSN

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs

Doctors, dentists and nurses

Hospitals and nursing homes

Insurance premiums

Long-term care premiums - taxpayer

Long-term care premiums - spouse

Insurance reimbursement

Out-of-pocket lodging and transportation expenses

Number of medical miles

Other:

TAXES PAID

State income taxes - 1/23 payment on 2022 state estimate

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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

State and local sales taxes (except autos and special items)

Use taxes paid on 2023 purchases

Use taxes paid on 2022 state return

Sales tax on autos not included above

Sales taxes paid on boats, aircraft, and other special items

Real estate taxes - principal residence

Real estate taxes - property held for investment

Foreign income taxes

☐ Personal property taxes (including automobile fees in some states)

Attach Tax Notice

Attach Forms 1098

Home mortgage interest and points paid:

☐ _____

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):

Passive interest.....

maintains a bank record, or a written communication(s), and contribution amount(s).

Volunteer expenses (out-of-pocket)

Number of charitable miles.....

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.

Union and professional dues.....

Tax return preparation fee

Safe deposit box rental.....

Investment expenses.....

Estate tax, section 691(c).....

Unreimbursed employee expenses:

Other: