

Individual Tax Organizer (Basic Version)

Personal Information					
You:					
Name			Social Security Number		
Date of Birth			Occupation		
Phone Number			Email Address		
Marital Status:	Single	Married	Divorced	Legally separated	Widowed

Spouse:					
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:					
Dependent's 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:					
Dependent's 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:					
Dependent's 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:					
Dependent's 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

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

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:
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Other Questions or Concerns:
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