

2023 TAX CLIENT ORGANIZER

Welcome. We are asking everyone to fill out this organizer completely so we will have your current information on file. It is important to have current information to help us prepare your return correctly.

A **current** picture ID is also needed to complete your return. This will help protect you from identity theft. Please have your ID available, we do not keep copies on file.

Names — Taxpayer and (Spouse)	Social Security #	Date of Birth	Occupation

Phone: _____ Email: _____

Address: _____ City: _____ State: _____ Zip: _____

Filing Status: SINGLE MARRIED MARRIED FILING SEPARATE HEAD OF HOUSEHOLD QUALIFYING SURVING SPOUSE

EXEMPTION INFORMATION: Are you being claimed as a dependent on Parents / others. tax return? Check Here

DEPENDENTS:

			* Relationship	*Live w/you	*Daycare	*College	*Claim
*Full Name(s)	*DOB	*Social Security #	to you	# of Months	Y/N	Y/N	Y/N

INCOME TAX PREPARATION AND OR BOOKKEEPING AGREEMENT - IMPORTANT!!! SIGN BELOW!!!

We will prepare your Federal and State Tax Returns and or provide Bookkeeping services from the information you furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of the information.

The Internal Revenue Code requires that you have documentation for all your deductions, your signature indicates your compliance with those requirements. You have the final responsibility for the handling of each item on the return and the overall correctness of the return.

Your Tax returns are, of course, subject to review by the taxing authorities. It is your responsibility to be able to provide all and any records supporting the information on your Tax return, for generally up to 7 years. Billing for all services regarding IRS resolution will be based on the nature of services performed at that time.

Your payment is for Tax services provided and is due at the time of completion and at the time the Return is picked up by client or representative of client. Fees are calculated based on the number of Forms completed, considering the amount of time spent by the individual(s) involved, any special level of expertise required, and the size and scope of matters involved. Electronic Filing is included in price of a Tax Return. If the above fairly sets forth your understanding of our service arrangement, please sign this Agreement....

The information and documents that I have provided to Tomah Tax Station for the preparation of my 2023 Federal and State Tax returns are true and correct, to the best of my knowledge. This confirms the Terms and Objective of our engagement, and the nature and limitations of the income Tax or Bookkeeping Services that Michelle Radcliffe, or other Representative/Tomah Tax Station will provide to you.

Taxpayer

Spouse

Date:

2023 TAX QUESTIONS

For each item below **PLEASE** check **Yes** or **No**, then fill in Blank or circle the items that apply to your situation.

YES NO At any time during 2023, did you (or your Spouse) receive income from the following sources:

- ___ ___ 1. Wages? Tips? If Tips are not reported on W-2, provide amount of tips \$_____ Provide all **W 2's**
- ___ ___ 2. Interest or Dividends Income? Provide **1099-INTs. & 1099-DIVs.**
- ___ ___ 3. Social Security or Railroad Retirement Income? Provide **1099-SSAs**
- ___ ___ 4. Sales of Stock, mutual funds, bonds or other **non-business** assets? Provide **1099-Bs** and cost basis info.
- ___ ___ 5. Distributions from Pension, IRAs or Annuities? Provide **1099-Rs**
- ___ ___ 6. Unemployment Compensation for 2023? Provide **1099-G... Go Online and PRINT OFF**, if you do not receive in mail.
- ___ ___ 7. Did you receive Alimony? If so, how much \$_____. Date divorce was final. _____
- ___ ___ 8. Income from Partnership, S-Corp., Estate or Trust? Provide **Form K-1s.**
- ___ ___ 9. Do you operate a business? **YES/NO** Do you conduct this business from an Office in your Home? **YES/NO**
- ___ ___ 10. If you operate a **Farm, Business or Rental**, have you completed our **Income & Expense organizer form** w/Yearly Totals?
- ___ ___ 11. If you own **Rental Property**, have you completed an Income & Expense Worksheet **for Each of the Rentals you own?**
- ___ ___ 12. Gambling winnings? Provide **W-2Gs**. Do you have a detail of all winnings and losses? **YES / NO**
- ___ ___ 13. 1099-Misc/ other income from prizes, jury duty, cancellation of debt, hobby income, etc.? **Provide 1099-Misc.**
- ___ ___ 14. Purchase any products Out of State or on the Internet, for use in WI that you did not pay Sales Tax on? \$_____
- ___ ___ 15. **New Clients:** Receive a State Refund last year? **YES / NO**. (Returning clients: our system keeps track of this)
- ___ ___ 17. If you have Dependent Children, do you receive **Child Support** or other non-taxable benefits?
- ___ ___ 18. Have a mortgage on 1st or 2nd home? Please specify for Preparer. **Provide Form 1098 Mortgage Interest Stmt. from bank**
- ___ ___ 19. Pay Real Estate Taxes on your personal, vacation house or land? Provide **Real Estate Tax Statements** for amts **paid in 2023.**
- ___ ___ 20. Pay medical expenses, pay after tax payments for health insurance, or qualified long-term care insurance? For Schedule A
- ___ ___ 21. Make contributions to charitable organizations that you have receipts for? (Church, schools, Scouts, etc.) For Schedule A
- ___ ___ 22. Pay Federal and or State Quarterly Estimated Tax Payments for 2023? Provide sheet with amounts paid and when.
- ___ ___ 23. Move to be closer to a new job, if you were 50 or more miles away from your job, prior to your move? Provide documentation.
- ___ ___ 24. Contribute to an IRA, SEP, Keough, Roth or Simple retirement plan on your own? (Not 401K or 403B)
- ___ ___ 25. Pay for **Child or Dependent Care exp?** Provide Name of Provider, Address, SS or EIN#, and Amount Paid for each child.
- ___ ___ 26. Have **College Education Expenses** for yourself, spouse of your dependents? **Must Provide Form 1098-T** from College statement.
- ___ ___ 27. Pay Interest on **College Student Loans?** Provide Interest paid amount. \$_____
- ___ ___ 28. **Teachers:** Do you have any Teacher/Educator Expenses for your classroom, books, or supplies? Amount \$_____
- ___ ___ 29. Cash in or contribute to any **Ed Vest Funds** to pay college education expenses?
- ___ ___ 30. Have any **Births, Deaths, Marriage, or Divorce** in 2023?
- ___ ___ 31. Make any Health Savings Account contributions or distributions? Provide HSA forms
- ___ ___ 32. Have distributions from Qualified Tuition Savings Plans? Provide **1099-Qs** (Such as Ed vest Funds)
- ___ ___ 34. Purchase/Sell a home in 2023? Provide **Closing Statement** or bring in closing folder.
- ___ ___ 35. Did you have Health Insurance through **Healthcare.gov?** If yes, provide **Form 1095-A**. It can be found on the healthcare.gov site.
- ___ ___ 36. **Total yearly rent paid** for 2023? \$_____ Heat included? **YES / NO** If income below \$25000 Rent Certificate needed.
- ___ ___ 37. If you get a Refund, do you want it **Direct Deposit?** Provide a cancelled check or a deposit slip. Or fill in below

Name of Bank _____ Routing # _____ Checking Acct# _____ or

Savings Acct# _____

*****Note: Several Tomah area banks have new routing numbers**