

THE TAX ADVANTAGE 2023 TAX YEAR ORGANIZER AND QUESTIONNAIRE—PAGE 1

PLEASE COMPLETE ALL PERTINENT PAGES OF THIS ORGANIZER AND RETURN TO US WITH YOUR DOCUMENTS

	NAME	BIRTH DATE	OCCUPATION	PHONE	EMAIL
YOURSELF					
SPOUSE					

Marital Status: Married Filing Joint (date of marriage _____)

Married Filing Separate (date of separation _____)

Single (if divorced, date of legal divorce _____)

Widow(er) (date of spouse's death _____)

Explain any changes from prior year _____

Current Address you live at _____

Mailing Address (if different) _____

Did you receive any income not included on a W-2, 1099, and/or K-1? (such as business or hobby income, tips, rents, alimony etc).....YES / NO

Did you purchase items without paying sales tax (i.e. from the internet or from out of state)?.....YES / NO

Any sort of foreign accounts or trusts, or other offshore activities where you had a financial interest or signature authority?.....YES / NO

Did you receive, sell, send, exchange, or otherwise acquire any Virtual Currency or Digital Assets? If yes, provide more infoYES / NO

Did you have health care coverage for all 12 months of 2023 for yourselves and your dependents? (provide 1095-B).....YES / NO

Did you have insurance through Covered CA, or other Obamacare? (provide 1095-A, CA Form 3895, and dependents income).....YES / NO

Did you pay over \$2,600 for the year (or over \$1,000 for a quarter) to a "household employee"?.....YES / NO

Was any part of your home mortgage paid by someone else or did you receive any mortgage assistance?.....YES / NO

Did you borrow any additional funds from your home mortgage, such as a HELOC or other home-secured line of credit?.....YES / NO

Did you or any family members take any college or other post-high school classes? If yes, provide the 1098-T and book expenses.....YES / NO

Did you receive any grants, scholarships, 529 plan distributions, or other reimbursements for any of the above schooling?.....YES / NO

Did you and your dependents reside in the U.S. for all of 2023?.....YES / NO

Did you make any gifts over \$17,000 during the year?.....YES / NO

Were you notified by any taxing authorities of changes or audits to your prior years tax returns?.....YES / NO

Did you convert any traditional IRA funds to a Roth IRA?.....YES / NO

Have you contributed or withdrawn from an HSA (health savings account) during the year? If yes, provide 1099-SA.....YES / NO

Any dependents move in or out or other dependent changes? (including a child reaching age 19).....YES / NO

Can you provide documentation for all deductions, dependents, and marital status if requested by the taxing authorities?.....YES / NO

COMMENTS:

To the best of my knowledge, I attest that the information on all pages of this document are true and accurate:

Client Signature _____ Date _____

Spouse Signature _____ Date _____

THE TAX ADVANTAGE 2023 TAX YEAR ORGANIZER AND QUESTIONNAIRE—PAGE 2

If you have an Identity Protection PIN obtained in 2024 enter it here _____ Spouse IP PIN _____

Enter your checking account info for direct deposit of any refunds: Routing _____ Account _____

How much were your cash or check donations to charity that you can document? _____

How much were your documented non-cash (goods) donations? _____ (need details if over \$500)

How much was the license fee of your DMV registration fees? (enter amount, or give us the DMV bills) _____

If you contributed towards a 2023 IRA outside your employer: Type: _____ (Roth or Traditional) Amount _____

Energy saving improvements (solar, windows, doors, furnace, A/C, insulation, etc paid in 2023) _____

Medical expenses paid in 2023 (must exceed 7.5% of your income). Include insurance premiums, prescriptions, glasses, dental, hearing aids, co-pays, etc (do not include any expenses that were part of an FSA, HSA, or other tax deferred plan) _____

If you purchased any vehicles during the year, how much was the sales tax paid? _____ Electric Vehicle? _____

Amount of Alimony you paid in 2023 _____ Date of last alimony agreement _____ Payee Name and Social _____

Do you wish to purchase any US Savings I-Bonds with your federal tax refund? If so, how much \$ _____

If you are a classroom teacher or other eligible educator, how much did you pay in 2023 for classroom expenses? _____

Enter your job related expense description and amounts below. This includes expenses such as union dues, tools, safety equipment, uniforms, teaching expenses, supplies, books, magazines, travel, job search, moving expenses, computers, business gifts, phone charges, and other unreimbursed work expenses. Also tax preparation and investment fees, certain legal costs, safe deposit box fees, IRA fees. All these items are no longer deductible for federal tax purposes, but they may be for state. _____

Amount of property tax paid in 2023 (if not included on your mortgage company 1098) _____

Estimated payments made for 2023 tax year (include date of each payment):

Federal _____ State _____

PROVIDE THE FOLLOWING DOCUMENTS IF APPLICABLE:

- * W-2's from employers / 1099's from other payers, banks, credit unions, investment companies, etc / K-1's from trusts, estates, pships, etc
- * Interest Statements (1098's) from your mortgage lenders
- * 1095's for your medical insurance coverage
- * Closing disclosures or settlement statements and 1099-S if you purchased, sold, or refinanced a home
- * 1098-E for any student loan interest paid
- * 1099-C or 1099-A for any debt forgiveness or loan modifications
- * Any correspondence received from the IRS and/or other taxing authorities
- * New Clients: Drivers Licenses, SS Cards, Prior Year Tax Return(s)

COMMENTS:

THE TAX ADVANTAGE 2023 TAX YEAR ORGANIZER AND QUESTIONNAIRE—PAGE 3

DEPENDENTS (Attach documentation for new dependents)

Name _____ Date of Birth _____ Relationship _____ SSN _____
Number of nights with you in 2023 _____ Income _____ Full time student? YES / NO IP PIN? _____
If college student: tuition paid in 2023 _____ Required books and supplies purchased in 2023 _____
If daycare, enter info (amount, provider name, TIN, address, phone) _____
Comments _____

Name _____ Date of Birth _____ Relationship _____ SSN _____
Number of nights with you in 2023 _____ Income _____ Full time student? YES / NO IP PIN? _____
If college student: tuition paid in 2023 _____ Required books and supplies purchased in 2023 _____
If daycare, enter info (amount, provider name, TIN, address, phone) _____
Comments _____

Name _____ Date of Birth _____ Relationship _____ SSN _____
Number of nights with you in 2023 _____ Income _____ Full time student? YES / NO IP PIN? _____
If college student: tuition paid in 2023 _____ Required books and supplies purchased in 2023 _____
If daycare, enter info (amount, provider name, TIN, address, phone) _____
Comments _____

Name _____ Date of Birth _____ Relationship _____ SSN _____
Number of nights with you in 2023 _____ Income _____ Full time student? YES / NO IP PIN? _____
If college student: tuition paid in 2023 _____ Required books and supplies purchased in 2023 _____
If daycare, enter info (amount, provider name, TIN, address, phone) _____
Comments _____

(Attach separate page if more dependents)

Are you able to provide definitive proof (and keep the documents for 4 years) that you are you eligible to claim your dependents if audited?.....YES / NO

Have you ever had any credits related to your dependents disallowed or reduced? (If yes, provide details).....YES / NO

Are any of your dependents filing their own tax return? (If yes, provide details).....YES / NO

To your knowledge is anyone else (such as a non-custodial parent, etc) claiming any of the tax benefits for any of these dependents?.....YES / NO

Have you signed or received a Form 8332 "Release/Revocation of Claim to Exemption for Child" (or similar statement)?.....YES / NO

Circle the items that you can provide to the IRS in order to substantiate that you paid more than half the cost of maintaining your home:

Utility Bills Grocery Receipts Rent Receipts or Mortgage Interest Property Tax Bills Other Household Bills

Documentation for dependents could include 1095's, report cards, medical records, birth certificates, SS cards, lease agreements, etc

THE TAX ADVANTAGE 2023 TAX YEAR ORGANIZER AND QUESTIONNAIRE—PAGE 4

SELF-EMPLOYED BUSINESS / RENTAL PROPERTY WORKSHEET

(complete this, or give us your own P&L)

SELF-EMPLOYED BUSINESS

Name of Business _____
Type of Business _____
Business Address _____
Date Business Started _____

INCOME / COST OF GOODS SOLD:

Gross Receipts _____
Returns _____
Inventory at beginning of year (cost) _____
Inventory at end of year (cost) _____
Purchases (do not include below) _____

EXPENSES:

Advertising _____
Insurance _____
Interest _____
Legal & Professional Services _____
Office Supplies _____
Rent _____
Repairs and Maintenance _____
Supplies not included in COGS _____
Licenses _____
Travel _____
Meals _____
Phone _____
Wages of employees _____
Payroll taxes (attach reports) _____
Continuing Education _____
Bank Charges _____
Professional Publications _____
Professional Organizations _____
Postage and Mailing _____
Software _____
Depreciable Assets (itemize separately)
Car and Truck Expenses _____
Business Miles _____ Total Miles _____
Misc Expenses _____
Home Office Expenses (itemize separately)
Other Expenses:

RENTAL PROPERTIES

Address of Property _____

Days Rented at Market Value _____
Days of Personal/Family/Friend Use _____

INCOME:

Rents Received _____
Security Deposit Kept for Expenses _____

EXPENSES:

Advertising _____
Transportation _____
Cleaning and Maintenance _____
Commissions _____
Insurance _____
Legal & Professional Services _____
Management Fees _____
Mortgage Interest _____
Property Tax _____
Other Interest _____
Repairs _____
Supplies _____
Licenses and Permits _____
Painting and Decoration _____
Gardening _____
Pest Control _____
Plumbing and Electrical _____
Phone Charges _____
Wages and Salaries _____
Utilities _____
Home Warranty/Protection Plan _____
Office Supplies _____
Travel _____
Bank Charges _____
Professional Publications _____
Capital Improvements (itemize separately) _____
Other Depreciable Assets (itemize) _____
Misc Expenses _____
Other Expenses: