

Tax Organizer for 2023

■ PERSONAL INFORMATION					
Taxpayer's name			Spouse's name		
<i>Check here if no change to your contact info in 2023</i>			<i>Check here if no change to your contact info in 2023</i>		
Date of birth			Date of birth		
<input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately			Date of move to current home, if in 2023		
Address/city/state/zip					
Occupation			Spouse occupation		
Mobile telephone			Spouse mobile telephone		
E-mail			Spouse e-mail		

Please check the box to indicate your response to the following questions:

	YES	NO		YES	NO
Do you want to opt out of electronic banking?			Did you put money into an IRA? (not through employer)		
If not, do you want direct deposit of any refund?			Did you contribute to a 529 college savings plan that you own?		
If not, Do you want to pay any tax due by debit? (You'll authorize the amount and date of debit.)			Did you pay an organization or business for childcare so that you & spouse could work full-time?		
Did you move in 2023			Do you have any foreign financial accounts or business?		
Did you have child or begin the adoption?			Did you buy, sell or have any transactions with cryptocurrency?		
Did you married or divorce?			Did you make estimated tax payments (not withholding)?		
Did you or your spouse have Long Term Care insurance?			Did you sell real estate or personal property?		
Do you have state-issued ID?			Did you contribute money to a charitable organization?		
Did you /your family have health insurance purchased on the Healthcare Exchange? If so, provide form 1095A. https://www.healthcare.gov/tax-form-1095/			If you had very high unreimbursed medical expenses check here and report them on the Income, Adjustments, Deductions Wksht		
Did you pay student loan interest?			Did you contribute things to a charitable organization?		
Do you own real estate?			Did you pay college tuition?		