

2023 Individual Tax Organizer

Personal Information

Taxpayer

First name	M.I.	Last name	Suffix	Date of birth	SSN or ITIN
Occupation	Email			Phone number	
ID type	ID number	Issuing state	Issue date	Expiration date	
Street	City		State	ZIP Code	

Spouse

First name	M.I.	Last name	Suffix	Date of birth	SSN or ITIN
Occupation	Email			Phone number	
ID type	ID number	Issuing state	Issue date	Expiration date	

Filing status: ☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying surviving spouse

Select all that apply to 2023	Taxpayer	Spouse
Legally blind	<input type="checkbox"/>	<input type="checkbox"/>
Permanently and totally disabled	<input type="checkbox"/>	<input type="checkbox"/>
Claimed as a dependent on another individual's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Full-time student	<input type="checkbox"/>	<input type="checkbox"/>
Designate \$3 to the Presidential Election Campaign Fund	<input type="checkbox"/>	<input type="checkbox"/>
Spouse is not filing a tax return (MFS)		<input type="checkbox"/>
Spouse had no income (MFS)		<input type="checkbox"/>

Dependent Information

Name (first and last)	Relationship	Date of birth	SSN or ITIN	Months in home	Received income	Disabled	Full time student	Childcare expenses
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Refund preference

- ☐ Direct deposit
- ☐ Paper check

Balance due preference

- ☐ Bank draft
- ☐ Mail a check
- ☐ Credit card
- ☐ Payment plan

Banking information

Financial institution _____

Account holder _____

Routing number _____

Account number _____

Type of account ☐ Checking ☐ Savings

Personal or business ☐ Personal ☐ Business

Select if applicable to account: ☐ IRA ☐ Non-U.S.

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☐ None apply

2023 Life Events

- | | |
|---|---|
| <input type="checkbox"/> Changed marital status | <input type="checkbox"/> Taxpayer, spouse, or a dependent received an identity protection PIN (IP PIN) from the IRS |
| <input type="checkbox"/> Taxpayer, spouse, or a dependent changed their name with the SSA | <input type="checkbox"/> Had a baby or adopted a child |
| <input type="checkbox"/> Received notice or letter from the IRS or a state revenue agency | <input type="checkbox"/> Member of the Armed Forces
Duty type _____ |
| <input type="checkbox"/> First time filing a tax return | <input type="checkbox"/> Changed address during the year |
| <input type="checkbox"/> Taxpayer, spouse, or a dependent passed away during the year | |

☐ None apply

2023 Financial Events

- | | |
|---|--|
| <input type="checkbox"/> Bought, sold, or refinanced a home or rental property | <input type="checkbox"/> Had a financial interest in or signature authority over a foreign account or trust
<input type="checkbox"/> Combined value of foreign account(s) exceed \$10,000 |
| <input type="checkbox"/> Incurred property damage or theft caused by a federally declared disaster | <input type="checkbox"/> Gifted more than \$17,000 total to one or more individual(s) |
| <input type="checkbox"/> Converted or rolled over any retirement accounts | <input type="checkbox"/> Purchased health insurance through the Marketplace or a public exchange |
| <input type="checkbox"/> Received, sold, exchanged, gifted or otherwise disposed of a digital asset | <input type="checkbox"/> Had health insurance coverage for the entire year (CA, DC, MA, NJ, and RI only) |

2023 Income Sources

- | | Number of forms | | Number of forms |
|---|-----------------|--|-----------------|
| <input type="checkbox"/> Employment (W-2) | _____ | <input type="checkbox"/> Rent (1099-MISC) | _____ |
| <input type="checkbox"/> Retirement distribution (1099-R) | _____ | <input type="checkbox"/> Royalties (1099-MISC) | _____ |
| <input type="checkbox"/> Social Security (SSA-1099) | _____ | <input type="checkbox"/> ESA or 529 distribution (1099-Q) | _____ |
| <input type="checkbox"/> Self-employment (1099-NEC or 1099-K) | _____ | <input type="checkbox"/> HSA or MSA distribution (1099-SA) | _____ |
| <input type="checkbox"/> State or local tax refund (1099-G) | _____ | <input type="checkbox"/> Partnership (Schedule K-1) | _____ |
| <input type="checkbox"/> Unemployment compensation (1099-G) | _____ | <input type="checkbox"/> S-corporation (Schedule K-1) | _____ |
| <input type="checkbox"/> Interest (1099-INT) | _____ | <input type="checkbox"/> Estate or trust (Schedule K-1) | _____ |
| <input type="checkbox"/> Dividends (1099-DIV) | _____ | <input type="checkbox"/> Gambling (W-2G) | _____ |
| <input type="checkbox"/> Sold stocks or investments (1099-B) | _____ | <input type="checkbox"/> Farming | _____ |
| <input type="checkbox"/> Canceled debt (1099-C) | _____ | <input type="checkbox"/> Other income not listed above _____ | |

☐ None apply

2023 Adjustments and Credits

- | | Amount |
|---|-------------|
| <input type="checkbox"/> Higher education expenses | \$ _____ |
| <input type="checkbox"/> Child or dependent care expenses | \$ _____ |
| <input type="checkbox"/> HSA contributions | <div></div> |
| <input type="checkbox"/> IRA contributions | \$ _____ |
| <input type="checkbox"/> Student loan interest | \$ _____ |
| <input type="checkbox"/> Plug-in electric vehicle purchase
Vehicle year, make, and model _____ | \$ _____ |
| <input type="checkbox"/> Adoption expenses | \$ _____ |
| <input type="checkbox"/> Alimony paid
Date of divorce or separation _____
Recipient's SSN _____ | <div></div> |
| <input type="checkbox"/> Educator expenses | \$ _____ |
| <input type="checkbox"/> Household employee expenses | \$ _____ |
| <input type="checkbox"/> Energy-efficient home improvements | \$ _____ |
| <input type="checkbox"/> Armed Forces moving expenses | \$ _____ |

Itemized Deductions

Medical and dental	
Medical and dental expenses	\$

Casualty and theft	
Casualty and theft losses	\$
<input type="checkbox"/> Check if caused by federally declared disaster	

Taxes paid	
State and local income taxes	\$
Sales taxes	\$
Real estate taxes	\$
Personal property taxes	\$

Gambling	
Gambling losses	\$

Interest paid	
Mortgage interest	\$

Other miscellaneous deductions	
	\$
	\$
	\$
	\$
	\$
	\$

Charitable contributions	
Donations to charity (cash)	\$
Donations to charity (non-cash)	\$

Estimated Taxes

Overpayments and estimated tax payments				
	Federal		State:	
Description	Date	Amount	Date	Amount
2022 overpayment applied to 2023				
First quarterly payment				
Second quarterly payment				
Third quarterly payment				
Fourth quarterly payment				
Additional payment(s)				