

## 2023 INCOME TAX RETURN

**Filing Status:**  Single  Married Filing Joint  Qualifying Surviving Spouse<sup>1</sup>  Head of Household<sup>2</sup>  Married Filing Separate

**In year 2023 only:**  Married (date: \_\_\_\_\_)  Divorced (date: \_\_\_\_\_)  
 Taxpayer Death (date: \_\_\_\_\_)  Spouse Death (date: \_\_\_\_\_)

**TAXPAYER**

**SPOUSE**

Name _____ Occupation _____ SSN _____ Date of Birth _____ Home Phone _____ Disabled <input type="checkbox"/> Work Phone _____ Blind <input type="checkbox"/> Cell Phone _____ Best Time to Call _____ Fax _____ Email _____ Address _____ City _____ State _____ Address on Last Year's Tax Return (if different) _____	Name _____ Occupation _____ SSN _____ Date of Birth _____ Home Phone _____ Disabled <input type="checkbox"/> Work Phone _____ Blind <input type="checkbox"/> Cell Phone _____ Best Time to Call _____ Fax _____ Email _____ County _____ Zip Code _____ Date Address Changed _____
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<sup>1</sup> All of the following must apply: your spouse died in 2021 or 2022; in that year you qualified to file jointly; you did not remarry before January 1, 2024 and you paid over half the cost of maintaining your home, which was your dependent child's (or stepchild's) main home for the entire year.

<sup>2</sup> Must be unmarried (or considered unmarried) at the end of the tax year, and maintain a home that for more than half of the tax year is the principal home of a qualifying person (generally your child or relative). You may be considered unmarried if your spouse did not live in your home during the last six months of the tax year. If you are maintaining the household of a parent, the parent does not need to live with you to qualify.

## Personal Income Tax Organizer and Deduction Finder<sup>®</sup>

### ✓ CHECKLIST

**Documents  
needed in addition  
to your completed  
organizer:**

- All Forms W-2 (wages), 1095, 1098, and 1099 (such as 1099-INT for interest; 1099-DIV for dividends; 1099-B for sale of securities; 1099-R for annuities, pensions, IRA or other retirement plan withdrawals; 1099-G for state tax refunds, unemployment compensation, etc.; 1099-S for real estate sales; SSA-1099 for social security; 1099-K for merchant card and third-party network payments; 1099-MISC for rents, royalties, prizes, and awards, etc.; and 1099-NEC for nonemployee compensation, etc.). Include all copies.
- Schedules K-1 for partnerships, S corporations, estates, or trusts. (**Note:** You do not need these documents to make your tax appointment. You can provide them at a later date.)
- If you sold real estate, stock, or mutual fund shares during the year, see STEP 4.
- If you acquired, sold, or refinanced a home or other property in 2023, provide a copy of the closing statement.
- If you are a new client, provide copies of tax returns for the last three years.

**Note:** When completing your organizer, round all amounts to the nearest dollar. For married couples, questions referring to "you" generally mean you or your spouse.