## Geety, Blair & Associates, PA 7257 Parkway Dr Ste 230 Hanover, MD 21076 (410) 551-7601

February 12, 2024

Dear Client,

As 2023 ends and the new year begins, we hope 2024 will be a happy and prosperous year for you. Enclosed is your 2023 Tax Organizer which we will use in preparing your 2023 tax return(s). It summarizes your 2022 tax forms and information and provides space for you to enter your 2023 data. If you prefer to use a fillable PDF, email us at taxes@GBAaccounting.com. **Completing the "2023 Questions" in the organizer is required** because it identifies additional information needed to complete your return. A fully completed organizer lessens the likelihood of omissions from your tax return.

Please do not provide your documents in picture format, as it is unacceptable for processing and filing. They must be originals, paper copies or in PDF format. Call us if you need assistance creating PDFs. If you have already prepared separate business and rental property summaries of income and expenses, attach them to the related organizer page. Please do not comingle personal expenses with business and rental expenses. We would appreciate it if you wait until you have completed your organizer and received all of your documents before mailing, emailing or dropping them off.

We will continue to take precautions for in-person drop off and pick up appointments. In-person appointments can be scheduled between 10 a.m. & 4 p.m. Monday through Thursday. We will be working remotely Friday and Saturday. If you prefer, you can use Secure Drawer, now Revver, which is a document portal to provide us with your organizer and documents and receive the completed returns. Secure Drawer/Revver is available 24/7. All signature pages can be signed using DocuSign via email. We will respond to phone calls and emails during normal business hours Monday through Saturday. As always, we thank you for the opportunity to provide services to you.

Sincerely, *Katrina Geety* Katrina Geety, CPA

#### Geety, Blair & Associates, PA 7257 Parkway Dr Ste 230 Hanover, MD 21076 Telephone: (410)551-7601 Fax: (410)551-7752 E-mail: taxes@GBAaccounting.com

## 2023 TAX ORGANIZER

Taxpayer Information	1		Spou	se Information		
Last name Test Clier	Last name	Last name				
First name						
Middle Initial	Middle Initial			Suffix		
Social security number		Social security	/ number			
Occupation		Occupation				
Work phone						
Cell phone		Cell phone				
E-mail address		E-mail addres	s			
Date of birth		Date of birth .				
Address				Apartment nu	mber	
City		State				
Home phone	Fax r	number				
Dependent Information						
- First name	м	Social Security Number	<b>.</b> .			
Last name	Suffix	Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense	
Child and Dependent Care Provider Exp	penses					
Name		Address		ID Number	Amount Paid	
Education Tuition and Fees						
Attach all Form 1098-Ts and a list of your qualified ea	ducation expens	ses.				
Student Loan Interest Paid						
Enter total 2023 qualified student loan interest.						

### 2023 Income

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation Employer Name		2022 Amount
ttach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement 1099-R Payer Name	, Profit-Sharing	J, IRAs, etc 2022 Amount
Social Security Benefits from Form SSA-1099	axpayer	Spouse
Railroad Retirement Benefits from Form RRB-1099		
tach Form(s) 1099-MISC — Miscellaneous Income and 1099-NEC 099-MISC Payer Name and 1099-NEC Payer Name		
ttach Form(s) 1099-INT — Interest Income 099-INT Payer Name		2022 Amount
ttach Form(s) 1099-DIV — Dividend Income 099-DIV Payer Name		2022 Amount
ttach Form(s) 1099-B, 1099-S — Sales of Stocks, Bonds, Real Estate, etc Attach all stock sale transaction information, including initial cost information.		
t <b>her Government Forms to attach:</b> Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs	Trust or Estate Inc	come, Form(s) W-2G
<b>ther Income:</b> Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expen nclude a list of all new equipment acquired this year, including date of purchase and cost.	ses for any business,	rental or farm you own.
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	Taxpayer	Spouse
etirement Plan Contributions Traditional IRA contributions made for 2023		Spouse

## 2023 Deductions

	2023 Amount	2022 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		
Taxes	2023 Amount	2022 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		
Interest Expenses Home mortgage interest paid — Attach Form(s) 1098. Lender's Name	2023 Amount	2022 Amount
Points paid on loan to buy, build or improve main home Lender's Name	2023 Amount	
Cash/Check/Credit Contributions	2023 Amount	2022 Amount
Noncash Charitable Contributions Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property.	onation, date acquired and	date contributed,
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property.  Miscellaneous Deductions	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. Miscellaneous Deductions Union and professional dues	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning)	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning) Job search costs	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning) Job search costs Taxpayer educator expenses.	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning) Job search costs Taxpayer educator expenses. Spouse educator expenses.	2023 Amount	2022 Amount
your cost, value at time of donation, and how you acquired the property.  Miscellaneous Deductions Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning) Job search costs Taxpayer educator expenses. Spouse educator expenses. Tax return preparation fees	2023 Amount	2022 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of d your cost, value at time of donation, and how you acquired the property. <b>Miscellaneous Deductions</b> Union and professional dues Professional subscriptions, books, supplies Uniforms and protective clothing (including cleaning) Job search costs Taxpayer educator expenses. Spouse educator expenses.	2023 Amount	2022 Amount

#### 2023

# Questions

If no, attach explanation of changes expected.   25   Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach									No
attach details									
3 Did you purchase a motor vehicle or boat during 2023 ?								$\square$	Γ
4 Did you purchase a hybrid or electric vehicle in 2023? If yes, enter year, make, model, and date purchased:         5 Did you chaste a vehicle in 2023? If yes, attach Form 1098C									
5 Did you donate a vehicle in 2023? If yes, attach Form 1098C									
6       What was the sales tax rate in your locality in 2023 ?	4 Did you purcha	ase a hybrid or electric	vehicle in 2023? If y	<b>es,</b> enter year, make	e, model, and	I date purchased:			
6       What was the sales tax rate in your locality in 2023 ?								Ц	Ļ
2       Did your marital status change during 2023?	5 Did you donate	e a vehicle in 2023? If	yes, attach Form 10	98C					L
If yes, explain:	6 What was the	sales tax rate in your l	ocality in 2023 ?	%	State ID	······			Г
8       Were you or your spouse permanently and totally disabled in 2023?          Do you have celements who must file?	2		g 2023?				•••••		L
9 Do you have dependents who must file?			v and tatally disable	d in 20222					Г
0       Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500?         1       Did you provide over half the support for any other person during 2023?         2       Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA         4       Did you receive any disability payments in 2023?         5       Did you receive any disability payments in 2023?         6       Did you you, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or bostness bad debts?         9       Did you uncur any non-business bad debts?       Did you uncur any non-business bad debts?         9       Did you uncur any moving expenses? If yes, attach details.       Did you uncur any moving expenses? If yes, attach details.         3       Did you use any income not included in this Tax Organizer?       Did you use attach information.       Did you versite expendent and the explanation of change expected.         11 no, attach explanation of change expected.       Did you versite explanation of thange expected.       Did you any any individual for domestic services statement?? If yes, has any portion of that loan been forgiven?       Dif you paidany alimony, enter recipient SSN									F
1       Did you provide over half the support for any other person during 2023?		•							F
2       Did you incur adoption expenses during 2023?	-		-	-		-			F
33       Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA         44       Did you receive any disability payments in 2023?         55       Did you receive any disability payments in 2023?         68       Did you by, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or 1099-A forms.         16       I you ou, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or 1099-A forms.         17       Did you incur any non-business bad debts?         18       Did you any individual for domestic services in 2023 ?         19       Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?.         12       Did you incur any moving expenses? If yes, attach details.         13       Did you receive any income not included in this Tax Organizer?         14       Yes, please attach information.         14       Do you expect your income and deductions in 2024 to be the same as 2023 ?         16       Did you botain a Paycheck Protection Program (PPP) loan?         16       Did you botain a Paycheck Protection Program (PPP) loan?         16       If you said any alimony, enter recipient's SSN:         17       Did you obtain a Paycheck Protec									F
or qualified plan within 60 days of the distribution?   4 Did you receive any disability payments in 2023?   15 Did you receive tip income not reported to your employer?   16a Did you by, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or 1093-A forms.   16 Did you incur any casualty or theft losses during 2023?   17 Did you incur any casualty or theft losses during 2023?   18 Did you incur any non-business bad debts?   19 Did you by or sell any stocks or bonds in 2023 ?   10 Did you by or sell any stocks or bonds in 2023 ?   10 Did you buy or sell any stocks or bonds in 2023 ?   11 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?   12 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?   12 Did you receive any income not included in this Tax Organizer?   14 yes, please attach information.   15 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach information.   16 Did you use any aphion of that loan been forgiven?   17 a Did you adain a Paycheck Protection Program (PPP) loan?   18 If you piad any alimony, enter recipient's SSN:   19 Did you adain a Paycheck Protection Program (PPP) loan?   19 Did you bay alimony, enter recipient's SSN:   19 Did you ada any alimony, enter recipient's SSN:   19 Did you state of residence   10 Tay ou state of residence   10 Tay ou state of residence   11 roo, stack of resi									L
5 Did you receive tip income not reported to your employer?   6a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023 ? If yes, attach closing or escrow statements, 1099-C or 1099-A forms.   b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?   c) Did you incur any casualty or theft losses during 2023 ?   c) Did you incur any non-business bad debts?   c) Did you soll any on-business bad debts?   c) Did you soll any on-business bad debts?   c) Did you soll any tocks or bonds in 2023 ?   c) Did you incur any non-business EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?   c) Did you receive any income not included in this Tax Organizer?   c) If yes, attach details   c) Did you receive any income not change expected.   c) Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach information.   c) A any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?   c) a Did you state or freedence.   c) Taxpayer   c) Spouse   c) a bid you any alimony, enter recipient's SSN:   c) Alimony paid:   c) bid you sel is and denote fingiven?   c) bid you sel any alimony, enter recipient's SSN:   c) Alimony paid:   c) bid you sel any alimony, enter recipient's SSN:   c) Alimony paid: <td>or qualified pla</td> <td>an within 60 days of the</td> <td>e distribution?</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>L</td>	or qualified pla	an within 60 days of the	e distribution?						L
16a       Did you buy, self, refinance, foreclose or abandon a principal residence or other real property in 2023 ? If yes, attach closing or escrow statements, 1099. Cor 1099- Kor 1099. Cor 1099-Kor 1099. Cor 1099. A forms.         17       Did you incur any casualty or theft losses during 2023 ?	4 Did you receiv	e any disability payme	nts in 2023?						
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If yes, please attach information.   14   15   16   17   16   17   18   19   19   19   19   10   10   10   10   11   11   12   12   13   14   14   15   14   15   15   16   16   17   18   19   11   19   11   10   11   12   12   13   14   14   15   15   14   15   15   16   16   17   16   17   16   16   17   16   16   17   16   16   17   16   17   16   17   16   16   17   16   17   16   17   16   17   16   17   16   17   16   17   16   17   16   17   16   17   16   17			-						F
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26 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?   27 a Did you obtain a Paycheck Protection Program (PPP) loan?   28 If you paid any alimony, enter recipient's SSN:   29 Enter your state of residence.   29 Enter your state of residence.   30 a Do you want to change the language with which the IRS communicates with you?   b If yes, which language?   b If yes, which language? <b>Filtertonic Filing and Direct Deposit of Refund</b> Yes N I our tax return is eligible for Electronic Filing, would you like to file electronically? The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. Yes, please provide a voided check (not a deposit slip) if your bank account information has changed. What type of account is this? State Local									Г
27 a Did you obtain a Paycheck Protection Program (PPP) loan?   b If yes, has any portion of that loan been forgiven?   28   29   Enter your state of residence.   29   a Do you want to change the language with which the IRS communicates with you?   b If yes, which language?   b If yes, which language? <b>Yes N Yes</b> , please provide a voided check (not a deposit slip) if your bank account information has changed. <b>Yes N State Local</b>	-	-			•				Ļ
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28       If you paid any alimony, enter recipient's SSN:	-	•						Н	Ļ
Spouse   So a Do you want to change the language with which the IRS communicates with you?   If yes, which language?   It yes, which language? It you tax return is eligible for Electronic Filing, would you like to file electronically? It he Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. It yes, please provide a voided check (not a deposit slip) if your bank account information has changed. Vhat type of account is this? Checking Savings State Local		5 1	Ũ						L
29 Enter your state of residence	<b>18</b> If you paid any	v alimony, enter recipie	ent's SSN:	Ali	mony paid:				
b If yes, which language? <b>Hectronic Filing and Direct Deposit of Refund</b> Yes N Yes N Yes N Yes not set in the internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. Yes not set internal Revenue Service is able to deposit? Yes please provide a voided check (not a deposit slip) if your bank account information has changed. Yes please provide a voided check (not a deposit slip) if your bank account information has changed. Yes please provide a voided check (not a deposit slip) if your bank account information has changed. Yes please provide a voided check (not a deposit slip) if your bank account information has changed. Yes please provide a voided check (not a deposit slip) if your bank account information has changed. Yes type of account is this? Savings State Local	Enter your stat	e of residence					·		
Electronic Filing and Direct Deposit of Refund       Yes       N         f your tax return is eligible for Electronic Filing, would you like to file electronically?       Image: State internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.       Image: State internal Revenue Service is able to deposit slip) if your bank account information has changed.       Image: State internal Revenue Service is able to deposit slip) if your bank account information has changed.       Image: State internal Revenue Service is able to deposit slip) if your bank account information has changed.       Image: State internal Revenue Service is able to deposit slip) if your bank account information has changed.       Image: State internal Revenue Service is able to deposit slip) if your bank account information has changed.       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service is able to deposit slip)       Image: State internal Revenue Service inter	-			-					
f your tax return is eligible for Electronic Filing, would you like to file electronically?	<b>b</b> If yes, which la	anguage?							
f your tax return is eligible for Electronic Filing, would you like to file electronically?									
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.	lectronic Filing	and Direct Deposit	of Refund					Yes	No
you receive a refund, would you like direct deposit?	•	-		•					L
yes, please provide a voided check (not a deposit slip) if your bank account information has changed.       Checking       Savings         /hat type of account is this?	he Internal Revenu	ue Service is able to de	eposit many refunds	directly into taxpaye	rs' accounts.				Γ
Vhat type of account is this?       Checking       Savings         stimated Tax Paid       Federal       Local									
Federal State Local							Checking Sa	vings	Γ
Federal State Local	stimated Tay P	aid							
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Image: Sector	Date	Amount	Date	Amount	ID	Date	Amount	$\rightarrow$	ID
Image: Constraint of the second se								-+	
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								-+	
			1	1					
	dditional Infor	<b>mation</b> (Enter any a	dditional information	here and attach any	y documents.	)			
	dditional Infor	<b>mation</b> (Enter any a	dditional information	here and attach any	y documents.	)			

# **State Information Worksheet**

	GENERAL	INFORMATION			
1 Enter your state of residence				axpayer	Spouse
<ol> <li>Enter your state of residence</li> <li>Check the appropriate box if:         <ul> <li>a Full year resident</li> <li>b Part year resident</li> <li>c Nonresident</li> </ul> </li> </ol>	Taxpayer	Spouse	entry:		
3 Resident locality:					
<b>4</b> County:	School district:		School district r	number:	
5 Check if disabled					ayer Spouse
	STATE	CREDITS			
6 Description/type of credit (for exa	ample, solar energy, carpool)		Cod	le Ai	mount
a b					
c					
d e					
	VOLUNTARY STA	TE CONTRIBUT	IONS	T	
7 Description/type of contribution	for example, wildlife, cancer)		Cod	le Ai	mount
a b					
с					
d e					
			l		
	MISCELLANE	OUS QUESTION	IS		
8 Did you file a state return for 2022	??				Yes No
9 Do you want state forms and instr	uctions sent to you next year?				🗆 🗆
10 Do you want any applicable penal	ty and interest calculated and	added to the return?			
11 How do you want your state refun a Refunded		mates	] c Apply to 2	024 taxes	
<b>12</b> Additional state information:					

#### ORG60

## 2023 Tax Documents to Send to Preparer

	Check items enclosed.
Gather	the following documents to send to your preparer.
	test