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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 commingle 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

2023
TAX ORGANIZER

Taxpayer Information	Spouse Information
Last name <u>Test Client</u>	Last name..... _____
First name _____	First name _____
Middle Initial..... _____ Suffix..... _____	Middle Initial..... _____ Suffix..... _____
Social security number _____	Social security number _____
Occupation _____	Occupation..... _____
Work phone _____ Ext ... _____	Work phone..... _____ Ext ... _____
Cell phone _____	Cell phone _____
E-mail address..... _____	E-mail address _____
Date of birth _____	Date of birth _____
Address _____	Apartment number..... _____
City _____	State..... _____ ZIP Code..... _____
Home phone..... _____	Fax number _____

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
Attach all Form 1098-Ts and a list of your qualified education expenses.
Student Loan Interest Paid
Enter total 2023 qualified student loan interest..... _____

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name

2022 Amount

_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name

2022 Amount

_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099

Railroad Retirement Benefits from Form RRB-1099

Medicare B premiums withheld.....

Medicare C premiums withheld.....

Medicare D premiums withheld.....

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name

2022 Amount

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name

2022 Amount

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

Taxpayer

Spouse

Traditional IRA contributions made for 2023

Roth IRA contributions made for 2023

SEP, Keogh, Individual 401(k) or SIMPLE Contributions

_____	_____	_____
_____	_____	_____
_____	_____	_____

2023 Deductions

Medical and Dental Expenses	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 donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions	2023 Amount	2022 Amount
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		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list): _____		

	Yes	No
1 Did a lender cancel any of your debt in 2023? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023? If yes , please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2023? If yes , enter year, make, model, and date purchased: _____	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2023? If yes , attach Form 1098C.....	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2023 ? % State ID		
7 Did your marital status change during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain: _____		
8 Were you or your spouse permanently and totally disabled in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file?.....	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500?...	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
16a 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.....	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?.....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any casualty or theft losses during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts?	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you buy or sell any stocks or bonds in 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you incur any moving expenses? If yes , attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you receive any income not included in this Tax Organizer?.....	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
24 Do you expect your income and deductions in 2024 to be the same as 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
25 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
26 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>
27 a Did you obtain a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, has any portion of that loan been forgiven?	<input type="checkbox"/>	<input type="checkbox"/>
28 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
29 Enter your state of residence..... Taxpayer _____ Spouse _____		
30 a Do you want to change the language with which the IRS communicates with you?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language?		

	Yes	No
Electronic Filing and Direct Deposit of Refund		
If your tax return is eligible for Electronic Filing, would you like to file electronically?.....	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?.....	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

Estimated Tax Paid							
Federal		State		Local			
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

State Information Worksheet

ORG60

GENERAL INFORMATION

	Taxpayer	Spouse
1 Enter your state of residence	_____	_____
2 Check the appropriate box if:	Taxpayer	Spouse
a Full year resident.....	<input type="checkbox"/>	<input type="checkbox"/>
b Part year resident	<input type="checkbox"/>	<input type="checkbox"/>
c Nonresident	<input type="checkbox"/>	<input type="checkbox"/>
	Date of entry: _____	Date of exit: _____
3 Resident locality: _____		
4 County: _____	School district: _____	School district number: _____
	Taxpayer	Spouse
5 Check if disabled	<input type="checkbox"/>	<input type="checkbox"/>

STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

MISCELLANEOUS QUESTIONS

	Yes	No
8 Did you file a state return for 2022 ?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you want state forms and instructions sent to you next year?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you want any applicable penalty and interest calculated and added to the return?	<input type="checkbox"/>	<input type="checkbox"/>
11 How do you want your state refund (if any) applied?		
a Refunded <input type="checkbox"/>	b Apply to 2024 estimates <input type="checkbox"/>	c Apply to 2024 taxes <input type="checkbox"/>
12 Additional state information: _____		

2023 Tax Documents to Send to Preparer



Check items enclosed.

Gather the following documents to send to your preparer.

[illegible]