

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

February 13, 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](mailto: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 .....	Last name .....
First name .....	First name .....
Middle Initial.....	Middle Initial.....
Suffix.....	Suffix.....
Social security number .....	Social security number .....
Occupation .....	Occupation.....
Work phone .....	Work phone.....
Ext ...	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	MI	Social Security Number	Date	Months Lived	Child Care
Last name	Suffix	Relationship	of Birth	with Taxpayer	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

<b>Medical and Dental Expenses</b>	<b>2023 Amount</b>	<b>2022 Amount</b>
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: _____		

  

<b>Taxes</b>	<b>2023 Amount</b>	<b>2022 Amount</b>
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 .....		

  

<b>Interest Expenses</b>		
Home mortgage interest paid — Attach Form(s) 1098.		
<b>Lender's Name</b>	<b>2023 Amount</b>	<b>2022 Amount</b>
Points paid on loan to buy, build or improve main home		
<b>Lender's Name</b>	<b>2023 Amount</b>	

  

<b>Cash/Check/Credit Contributions</b>	<b>2023 Amount</b>	<b>2022 Amount</b>

  

<b>Noncash Charitable Contributions</b>
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.

  

<b>Miscellaneous Deductions</b>	<b>2023 Amount</b>	<b>2022 Amount</b>
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 <b>yes</b> , 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 <b>yes</b> , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2023? If <b>yes</b> , enter year, make, model, and date purchased: .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2023? If <b>yes</b> , 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 <b>yes</b> , 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 <b>not</b> 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 <b>yes</b> , 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 <b>yes</b> , 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 <b>yes</b> , 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 <b>no</b> , 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? .....		

**Electronic Filing and Direct Deposit of Refund**

	Yes	No
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 <b>yes</b> , 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.)

---



---



---



---

**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....	.		
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles 01/01/2023 thru 12/31/2023.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No

# Business Income and Expenses

ORG19

## GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

1 Check ownership ☐ Taxpayer ☐ Spouse ☐ Joint

2 Business name .....

3 a Business street address.....

b 1 City, State and Zip Code, or .....

2 Foreign country..... (not applicable)

4 Principal business/profession .....

5 Employer ID number.....

6 Business code (Preparer Use Only) .....

Yes No

7 Was this business fully disposed of in a fully taxable transaction during 2023 ? ☐ Yes ☐ No

8 Accounting method:

Cash ☐

Accrual ☐

Other (specify) ☐

9 Method used to value closing inventory:

Cost ☐

Lower of  
cost or  
market ☐

Other (explain) ☐

Yes No

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory?

(If yes, attach explanation) .....

11 Did you materially participate in the operation of this business during 2023 ? .....

12 Did you start or acquire this business during 2023 ? .....

13 a Did you make any payments in 2023 that require you to file Forms 1099? .....

b If yes, did you or will you file all the required Forms 1099? .....

14 At-risk determination:

a Is all of the investment in this activity at risk? .....

b Is some of the investment in this activity not at risk? .....

15 Did you have unallowed passive losses in 2022 ? .....

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? .....

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? .....

Regular ☐

Extension ☐

No ☐

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....

d Was this business located in a Qualified Disaster Area? .....

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund) .....		

COST OF GOODS SOLD – IF APPLICABLE	2023	2022
20 Inventory at beginning of year .....		
21 Purchases .....		
22 Items withdrawn for personal use .....		
23 Cost of labor (do not include your salary) .....		
24 Materials and supplies .....		
25 Other costs .....		
26 Inventory at end of year.....		

# Business Income and Expenses (continued)

ORG19

EXPENSES	2023	2022
Business name _____		
<b>27</b> Advertising .....		
<b>28</b> Car and truck expenses (complete ORG18).....		
<b>29</b> Commissions and fees .....		
<b>30</b> Contract labor .....		
<b>31</b> Depletion .....		
<b>32</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>33</b> Employee benefit programs:		
<b>a</b> Employee health insurance premiums .....		
<b>b</b> Other employee benefit programs .....		
<b>34</b> Insurance (other than health) .....		
<b>35</b> Self-employed health insurance attributable to this business .....		
<b>36</b> Interest:		
<b>a</b> Mortgage paid to banks not reported to you on Form 1098.....		
<b>b</b> Other .....		
<b>37</b> Legal and professional services .....		
<b>38</b> Office expenses .....		
<b>39</b> Pension and profit-sharing plans .....		
<b>40</b> Rent or lease:		
<b>a</b> Machinery and equipment (enter vehicle lease on ORG18) .....		
<b>b</b> Other business property.....		
<b>41</b> Repairs and maintenance .....		
<b>42</b> Supplies (not included in cost of goods sold) .....		
<b>43</b> Taxes and licenses not reported to you on Form 1098 .....		
<b>44</b> Travel and meals		
<b>a</b> Travel.....		
<b>b</b> Meals subject to 50% limit.....		
<b>c</b> Meals subject to 80% limit.....		
<b>d</b> Meals not subject to limit .....		
<b>45</b> Utilities .....		
<b>46</b> Gross wages .....		
<b>47</b> Other expenses:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
<b>48</b> Expenses for business use of your home <b>(Preparer Use Only)</b> .....		
Complete ORG20 for Business Use of Home.		
<b>49</b> Qualified pension plan start-up costs .....		
<b>50</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>before</b> Jan. 1, 2018.....		
<b>51</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>after</b> Dec. 31, 2017 .....		



# Rent and Royalty Income and Expenses

ORG25

## BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: (not applicable) \_\_\_\_\_

Is this activity a qualified trade or business under Section 199A? ..... ☐ Yes ☐ No

- 1 Check property owner ..... ☐ Taxpayer ☐ Spouse ☐ Joint Yes No
- 2 a Did you make any payments that would require you to file Form(s) 1099? ..... ☐ ☐
- b If yes, did you or will you file all required Forms(s) 1099? ..... ☐ ☐
- 3 a Enter the ownership percentage (if not 100%) ..... \_\_\_\_\_
- b If not 100%, are you reporting 100% of the income and expenses? ..... ☐ ☐
- 4 Is this a rental property? (If yes, answer questions 5 through 11; if no, skip to question 12.) ..... ☐ ☐
- 5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? ..... ☐ ☐
- 6 For all rental properties, enter the number of days during 2023 that:
- a The property was rented at fair rental value ..... \_\_\_\_\_
- b The property was used personally or rented at less than fair rental value ..... \_\_\_\_\_
- c You owned the property, if not the entire year ..... \_\_\_\_\_
- 7 a Does this rental have multiple living units and you live in one of the units? ..... ☐ ☐
- b If yes, enter percentage of rental use ..... \_\_\_\_\_
- 8 Did you actively participate in this property's management during 2023 ? ..... ☐ ☐
- 9 Did you materially participate in this property's management during 2023 ? ..... ☐ ☐
- 10 Do you want to treat this property as non-passive? ..... ☐ ☐
- 11 Did this property have unallowed passive losses in 2022 ? ..... ☐ ☐
- 12 Did you dispose of this property in a fully taxable transaction? ..... ☐ ☐
- 13 Check this box if some of this investment was not at-risk ..... ☐
- 14 a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... ☐ ☐
- b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... Regular ☐ Extension ☐ No ☐
- c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... ☐ ☐
- d Was this activity located in a Qualified Disaster Area? ..... ☐ ☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME		2023	2022
15 Rents or royalties received .....			
<div> <div>* Property Types:</div> <div> <div>1 Single family residence</div> <div>2 Multi-family residence</div> <div>3 Vacation/short-term rental</div> <div>4 Commercial</div> </div> <div> <div>5 Land</div> <div>6 Royalties</div> <div>7 Self-rental</div> <div>8 Other</div> </div> </div>			

# Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2023	2022
Property location .....		
16 Advertising .....		
17a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance .....		
19 Commissions.....		
20a Mortgage insurance premiums — qualified .....		
b Other insurance .....		
21 Legal and professional fees .....		
22 Management fees .....		
23a Mortgage interest paid to banks — qualified.....		
b Mortgage interest paid to banks — other.....		
24 Other interest .....		
25 Repairs.....		
26 Supplies.....		
27a Real estate taxes.....		
b Other taxes .....		
28 Utilities .....		
29 Other expenses:		
a .....		
b .....		
c .....		
d .....		
e .....		
30a Depreciation and Section 179 deduction (Preparer Use Only).....		
b Depletion (Preparer Use Only).....		

# State Information Worksheet

ORG60

## GENERAL INFORMATION

	<b>Taxpayer</b>	<b>Spouse</b>
1 Enter your state of residence .....	_____	_____
2 Check the appropriate box if:	<b>Taxpayer</b>	<b>Spouse</b>
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: _____
	<b>Taxpayer</b>	<b>Spouse</b>
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

	<b>Yes</b>	<b>No</b>
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]