2023 1040 US Tax Organizer

Solowitz & Associates CPA's Inc

71650 Sahara Rd Ste 1 Rancho Mirage CA 92270

CLIENT INFORMATION

Telephone number: (760) 423-0133 Fax number: (888) 327-5901

E-mail address: nona@solowitzassociates.com

Tax Return Appointment

Date: Time: Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please enter all pertinent 2023 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

		Taxpayer	Spouse
First name and initial			
Last name			
Title/suffix			
Social security number			
Occupation			
Date of birth (m/d/y)			
Date of death (m/d/y)			
1=blind			
Home phone			
Work phone			
Work extension			
Cell phone	,		
E-mail address			
	In care of		
	Street address		
Address	Apartment number.		
Address	City		
	State		
	ZIP code		
DEPENDENTS		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y)			
Social security number			
Relationship			
Months lived at home			
		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix	,		
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y) .			
Social security number	,		
Relationship			
Months lived at home			

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MISC	ELLANEOU	S INCOME			
	Taxpayer: Ali		l		
	Spouse: Alim	ony received			
Other:					
DETI	DEMENT D		TRIBUTIONS		
			TRIBUTIONS	2023 Amount	2022 Amount
Taxpa	-		utions (1=maximum)		
			s (1=maximum)		
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Opous			s (1=maximum)		
			E, & qualified plan contributions (1=maximum)		
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OTH	ER GOVER	NMENT F	ORMS - DEDUCTIONS		
Fo	orm 1098-E - S	Student Ioan i	nterest	Attach Forms 1098	
Fo	orm 1098-T - T	uition and re	lated expenses	Attach Forms 1030	
_	ORDABLE C	- -			
∐ Fo	rm 1095-A - He	ealth Insuranc	ce Marketplace Statement	Attach Forms 1095	
VD II	USTMENTS	TO INCO	ME		
		IO INCO	IVIC		
Taxpa		ealth incuran	nce premiums		
	her adjustmer			L	
	anor adjacamen		•		
Ali	imony paid - F	Recipient nam	ne & SSN		
Spous					
			nce premiums		
Ot	her adjustmen	its to income	:		
Ali	imony paid - F	Recipient nam	ne & SSN		
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MED	ICAL AND	DENTAL E	EXPENSES		
Prescr	ription medicin	es and drugs	S		
	•				
			ayer		
-			se		
			ortation expenses		
			onation expenses		
Other:					
2 1011					
TAXE	ES PAID				
Stato	income taxes	- 1/23 navme	ent on 2022 state estimate		

	1040	US	Tax Organizer		
TAX	ES PAID (c	ontinued)		2023 Amount	2022 Amount
State	income taxes -	paid with 202	2 state extension		
State	income taxes -	paid with 202	2 state return		
State	income taxes -	paid for prior	years and/or to other states		
City/Ic	ocal income tax	es - 1/23 payr	ment on 2022 city/local estimate .		
City/Id	ocal income ta	xes - paid wit	th 2022 city/local extension		
City/Id	ocal income ta	xes - paid wit	th 2022 city/local return		
State	and local sale	es taxes (exce	ept autos and special items)		
Use ta	axes paid on 2	2023 purchase	es		
Use ta	axes paid on 2	2022 state ret	urn		
Sales	tax on autos	not included a	above		
Sales	taxes paid or	i boats, aircra	ft, and other special items		
Real	estate taxes -	principal resi	dence		
Real	estate taxes -	property held	for investment		
Foreig	gn income taxe	es			
	ersonal propei EREST PAII	,	uding automobile fees in some states)	Attach Tax Notice	
	mortgage inte	-	nts paid:		
H				Attach Forms 1098	
Home r	mortgage interest	not on Form 1098	(include name, SSN, & address of payee):		
Points	s not reported	on Form 1 0 98	8:		
Invest	tment interest	(interest on r	nargin accounts):		1
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– Passi	ve interest				
	ve interest.				
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CAS	H CONTRI	BUTIONS n is allowed for	or cash or check contributions unless the do		
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2023	1040	US	Miscellaneous Questions
	If any	of the foll app	owing items pertain to you or your spouse for 2023, please check the ropriate box and provide additional information if necessary.
YES	NO		ONAL INFORMATION marital status change during the year?
		Did your a	address change during the year?
		Could you	be claimed as a dependent on another person's tax return for \${Y+00}?
			NDENTS re any changes in dependents?
			of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years or udent) at the end of 2023?
			ave any children under age 19 or full-time students under age 24 at the end of 2023, with interest and ncome in excess of \$1,250, or total investment income in excess of \$2,500?
		HEAL ⁻	TH CARE COVERAGE
		Did you re	eceive IRS document Form 1095-A (Health Insurance Marketplace Statement), If so, please attach.
		INCON	
		,	eceive unreported tip income of \$20 or more in any month?
		yourself,	ash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for your spouse, or your dependents?
		Did you re	eceive any disability income?
		Did you h	ave any foreign income or pay any foreign taxes?
		PURC	HASES, SALES AND DEBT
			tart a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, tion, trust, or REMIC?
			urchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any assets to business use?
		Did you b	uy or sell any stocks, bonds or other investment property in \${Y+00}?
		Did you p	urchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
			nake any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel by sources?
		Did you h	ave any debts cancelled or forgiven?
		Does any	one owe you money which has become uncollectible?

ORGANIZER Page 6 **Miscellaneous Questions (continued)** 2023 US 1040 If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary. RETIREMENT PLANS NO YES Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you transfer or rollover any amount from one retirement plan to another retirement plan? **EDUCATION** Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? **ITEMIZED DEDUCTIONS** Did you incur a loss because of damaged or stolen property? Did you work out of town for part of the year? Did you use your car on the job (other than to and from work)? **ESTIMATED TAXES** Did you apply an overpayment of 2022 taxes to your 2023 estimated tax (instead of being refunded)? If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being Do you expect your 2024 taxable income and withholdings to be different from 2023? **MISCELLANEOUS** Do you want to allocate \$3 to the Presidential Election Campaign Fund? Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? May the IRS discuss your tax return with your preparer? Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

2023	1040	US	Miscellaneous Questions (continued)						
	If any	of the foll appi	owing items pertain to you or your spouse for 2023, please check the ropriate box and provide additional information if necessary.						
YES	NO	MISCE	LLANEOUS (continued)						
		Did you re	eceive a distribution from, or were you the grantor of, or transferor to, a foreign trust?						
		Was your	home rented out or used for business?						
		Medicare a payments	Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?						
		Did you re	eceive a distribution from an Achieving a Better Life Experience (ABLE) savings account?						
		Are you a military or	member of the Armed Forces of the United States on active duty who moved pursuant to a der related to a permanent change of station?						
		Did you er	ngage the services of any household employees?						
		Were you	notified or audited by either the Internal Revenue Service or the State taxing agency?						
		Did you or	your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust?						
		Did your b	pank account information change within the last twelve months?						
		At any tim any virtua	ne during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in I currency?						

ORGANIZER Page 8 1040 US **Direct Deposit & Estimates (Form 1040 ES)** 2023 3, 6 Please enter all pertinent 2023 information. **DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)** 1=direct deposit of federal tax refund into bank account 1=electronic payment of estimated tax BANK INFORMATION Percent to Type of Type of Account (Table 1) **Deposit** Name of Bank **Routing Number Account Number** (Table 2) (xx.xx) 2023 ESTIMATED TAX / 1040-ES (6) 2023 **Federal Amount Paid Date Paid** Voucher Amount Overpayment applied from 2022 1st quarter payment 2nd quarter payment..... 3rd quarter payment 4th quarter payment..... Additional Estimated Tax Payments Paid with extension..... Former spouse SSN if joint estimates 2023 State **Amount Paid Date Paid** TS **Voucher Amount** Overpayment applied from 2022 1st quarter payment 2nd quarter payment 3rd quarter payment 4th quarter payment Additional Estimated Tax Payments Paid with extension Type of Account Type of Investment 1 = Checking or savings (default) 2 = Taxpayer's IRA (next year limits) 3 = Spouse's IRA (next year limits) 4 = Health savings account (HSA) 5 = Archer MSA 6 = Coverdell savings account (ESA) 7 = Other 8 = Taxpayer's IRA (current year limits) 9 = Spouse's IRA (current year limits) 1 = Savings 2 = Checking

ORGANIZER Page 9 Direct Deposit & Estimates (Form 1040 ES) (cont.) 1040 US 7.1 2023 Please enter all pertinent 2023 information. **APPLICATION OF 2023 OVERPAYMENT (7.1)** If you have an overpayment of 2023 taxes, do you want the excess refunded? or applied to 2024 estimate? Other (please explain): 2024 ESTIMATED TAX INFORMATION Do you expect your 2024 taxable income to be different from 2023? If "yes" explain any differences in income, deductions, dependents, etc.: Do you expect your 2024 withholding to be different from 2023? If "yes" explain any differences:

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2023	1040	US	Partnersh	ip and S corpora	tion Information	20.1,20.2
PA			delete 2023 in		te. Be sure to attach all S	Schedule K-1s.
No.		ne of Partners		Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in Partnership
5.0	CORPORAT	ION INFO	ORMATION (2	20 20		
No.		e of S corpora	<u> </u>	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in S corporation

20.1,20.2

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2023	1040	US	Estate or Trust and REMIC Information	20.3,20.4
		Plea	se add, change or delete 2023 information as appropriate. Be sure to attach all Schedule K-1s and Schedule Qs.	

ESTATE OR TRUST INFORMATION (20.3)

No.	Name of Estate or Trust	Employer Identification Number	Tax Shelter Registration Number

REMIC INFORMATION (20.4)

No.	Name of REMIC	Employer Identification Number