

2023 Individual Taxpayer Organizer

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Please complete all sections of the organizers so we can ensure we have current information , even if there is no change.

Taxpayer				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	IP PIN	
Occupation		Date of birth MM/DD/YYYY		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Home phone		Work or cell	
Driver's License	No.		State	Issue Date	Exp. Date

Spouse				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	IP PIN	
Occupation		Date of birth MM/DD/YYYY		Are you new to our firm? Yes No	
Address <small>(If different from Taxpayer)</small>		City		State	Zip
County		Home phone		Work or cell	
Driver's License	No.		State	Issue Date	Exp. Date

Do you have an IRS Identity Protection PIN as a result of Identity Theft? Yes No Do you rent or own your home? Own or Rent

If you moved during 2023, enter your previous address.

Date of move

State information: States of residence during 2023 and dates ____ From _____ to _____ MM/DD/YY

School district _____ County _____

Marital status at 12/31/2023 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Were there any births during the year? If yes, provide birth certificates Yes No

Names of dependent children <small>Child's full name</small>	Social Security #	IP PIN	Date of birth MM/DD/YYYY	Months lived in home in 2023	Relationship	College student?
Other dependents or people who lived with you	Social Security #	IP PIN	Date of birth MM/DD/YYYY	Months lived in home in 2023	Relationship	Income

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Do any of the children have a disability? Yes No

Did any of the children have any income above \$1,250 for the year? Yes No

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" if unsure about a question.

LIFESTYLE & HEALTH	Do you want a soft copy uploaded to the portal, a physical return, or both? Soft Copy Physical Copy Both		
	If you want a physical copy, do you want to pick it up or have it mailed? Pick up mailed (\$15 fee applies)		
	The below options are for limited communication only and do not provide or allow Steadman Tax Services to represent you as your Power of Attorney with the IRS. If you need IRS representation for IRS issues, this would be covered under a separate engagement.		
	Yes	No	Would you like us to communicate with the IRS for this specific tax return if there are any issues regarding payments or refunds only?
	Yes	No	Would you like us to communicate and receive IRS confidential information directly from the IRS for multiple tax years?
	Yes	No	Are either you or your spouse legally blind?
	Yes	No	Did you pay or receive alimony during the year? Paid / Received \$ _____ Recipient's SSN _____ Provide copy of Divorce Decree
	Yes	No	Are you currently a member of the military or Retired military? State of residency _____
	Yes	No	Did you purchase health insurance through the Government Marketplace? Form 1095-A (REQUIRED)
	Yes	No	Did you contribute to a Health Savings Account (HSA) during the year? (This is separate from a FSA) If yes, provide Form 1099-SA and contribution amounts.
	Yes	No	Did you, or do you plan to contribute additional money to your HSA before 15 April 2024 for 2023 ?
	Circle:	One	Is the HSA account a Family plan or Individual Plan (Circle one) How many months did you participate in the HSA during the year? _____
	Yes	No	Do you have federal debt which is overdue, being collected, and is the responsibility of only one spouse?
	Yes	No	Did anyone in the household receive unemployment income during the year? If yes, provide 1099-Gs
	Yes	No	Did you pay anyone for domestic services that you hired directly and does not have their own business? (If yes, complete the Household Domestic Worksheet).
	Yes	No	Are you involved in bankruptcy, foreclosure, or repossession?
	Yes	No	Did you have any debt cancelled during the year? (includes credit cards, car loans, etc, provide 1099-C)
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement? Divorce?
	Yes	No	Did you provide any type of Gifts to any person (not a charity) during the year in excess of \$17,000? (this includes cash, assets or partial interest in property). If yes, please provide details.
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years? If yes, please explain type and year(s).
Yes	No	Did you make estimated tax payments during the year? If yes, please provide details on page 5.	
FOREIGN	Yes	No	Were you a citizen of OR lived in a foreign country? Foreign Country _____
	Yes	No	Did you have any accounts or assets outside the USA during the year? (Includes online, physical, virtual accounts, Pension, Trust, and Annuities, Real Estate, provide details) Value of account or FMV of assets _____.
	Yes	No	Did you receive a distribution from, or were you the grantor of, or transfer to, a foreign trust?
	Yes	No	Did you receive a gift from a foreign person? If yes, provide details.
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted during the year? If yes, provide birth certificates, social security cards and adoption records.
	Yes	No	Did you pay any college tuition for a child, a dependent, or yourself during the year? If yes, complete the Education Worksheet .(www.steadmantax.com/downloads)
	Yes	No	Did you make any contributions to a 529 plan during the year? If yes, please provide details.
	Yes	No	Did you take any distributions from a 529 plan during the year? Please provide Form 1099-Q.
	Yes	No	Did you pay any student loan interest during the year? If yes, provide Form 1098-E.
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (provide statement from provider with Tax ID, amount and address)
	Yes	No	Do you have any children who had more than \$1,250 of gross investment income for the year?

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" if unsure about a question.

INVESTMENTS	Yes	No	Did you roll over any amounts from a retirement account during the year? If yes, please provide details.
	Yes	No	Did you sell or transfer any stock or investment property? If yes, please provide details or statements.
	Yes	No	Did you, or will you, contribute any money to an Individual Retirement Arrangement (IRA) account for the year?
	This does not include any rollovers or 401Ks. This is for IRAs only. This question refers to direct contributions made by you or spouse throughout the year.		
	Traditional IRA: Taxpayer _____ / Spouse _____ Roth IRA: Taxpayer _____ / Spouse _____		
	Yes	No	Did you receive any income from an installment sale?
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft? Provide details
	Yes	No	Were you granted, or did you exercise, any employee stock options during the year? (provide 1099s and details)
HOME	Yes	No	Did you engage in any type of gambling during the year? (online sites, casino, sports gambling, etc) Explain
	Yes	No	Did you own any Virtual Currency (e.g. Bitcoin, Ethereum, Dogecoin, etc) or any have virtual currency transactions during the year?(If YES, Complete the Virtual Currency Worksheet, www.steadmantax.com/downloads)
	Yes	No	Do you anticipate Itemizing your deductions? (Mortgage Interest, property taxes, charity..etc) - complete Itemized worksheet at www.steadmantax.com/downloads
	Yes	No	Have you been issued a mortgage credit certificate (MCC)? (issued by the State; provide a copy of the certificate)
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.
	Yes	No	Did you pay sales taxes on a major purchase, such as a vehicle, boat, motorcycle, or RV home? provide receipts
	Yes	No	Did you make any charitable contributions? Please provide all statements.
	Yes	No	Did you have any uninsured loss to your property in a Federally Declared Disaster Area? (provide details)
	Yes	No	Did you sell a home during the year? If yes, provide closing statement and Form 1099-S if received.
OTHER DEDUCTIONS	Yes	No	Did you purchase a main home during the year? If yes, provide closing statement.
	Yes	No	Did you refinance a mortgage or take a home equity loan? (provide closing statements)
	Yes	No	Is either spouse a teacher, instructor, counselor, principal or aid for a K-12 school and work at least 900 hours during the year? Enter amt Taxpayer _____ Spouse _____
	Yes	No	Did you purchase your home in 2008 and claim the FirstTime Homebuyer Credit on your tax return? (This was the \$7500 loan included on your 2008 return and had to be paid back over 15 years, starting in 2010)
BUSINESS	Yes	No	Did you purchase a new energy-efficient car, truck, or van? Electric or Hybrid please provide purchase documents.
	Yes	No	Did you make any new energy-efficient improvements to your home? (Provide copies of invoice and proof of payment). If purchase was financed, we will need <u>invoice</u> and <u>financing</u> documents, energy star certified and certain items must have the certificate. HVAC, Water Heaters, Furnaces - must be certified energy efficient (please provide copy of <u>manufacturers certificate</u>) Solar, Wind, Geothermal, Biomass Fuel (Stoves designed to heat the house using organic materials)
	Yes	No	Do you own a business? You will need to complete a separate business organizer/worksheet for the business.
	Yes	No	If yes, is the activity engaged as a business and not a hobby activity? If you are unsure, please call.
Taxpayers must report income from both a business or a hobby. However how they are reported is quite different and will result in tax consequences. The IRS differentiates between the two by stating a business operates to make a profit where as, a hobby is carried on for sport or recreation, not to make a profit. Whether the activity is a business or a hobby will dictate the expenses allowed as a deduction on a tax return. For the business questions <u>and</u> farm questions, please indicate if the activity is established with the intent to make a profit or if it is a hobby. Intent involves whether you are treating it as a business with proper business factors, such as keeping accounting records.			
Yes	No	Do you own an LLC? If multiple, how many separate LLCs do you own? _____	
		What type of LLC? <input type="checkbox"/> Disregarded entity - files business on personal return (Schedule C/E/F) _____ <input type="checkbox"/> Partnership - files a separate return for the business (Form 1065) _____ <input type="checkbox"/> S-Corporation - files a separate return for the business (Form 1120S) _____	
Yes	No	Do you own rental property? If yes, please complete the rental worksheet.	
Yes	No	Did you receive income from a sharing/gig economy activity? (e.g Airbnb, Uber, Door Dash - complete Sole Proprietor wkst)	
Yes	No	Do you own a farm? (complete the Farm worksheet)	
Yes	No	Did you complete the appropriate business worksheet, either Business, Farm, Rental or Sole Proprietorship?	

Dependency Worksheet

(complete if claiming children, parents or other individuals as a dependent, use additional sheets as necessary)

Taxpayer Name: _____ Spouse Name: _____

List complete names of each dependent (child, parent, or other dependent) claimed on your return. Use additional sheets as necessary.

Is each dependent a U.S. Citizen, U.S. National, or U.S. Resident Alien? Yes No Yes No

Relation of each dependent (if adopted, please provide dates) _____

How many months (or days) did each dependent reside in your home?(see note1) _____

Total income received by dependent (including Social Security, investment, and other income) _____

Did you provide more than half the support for the dependent for the entire year? Yes No Yes No

Are you, or spouse, self-employed or receive any income from services or jobs you perform. (includes ride share, delivery, or other income producing activities) Yes No

1. Were all children claimed on this year's return naturally born to both parents listed on this return, and there are no divorced or separated parents situation, or other claims to dependency applies? (mark NA if claiming a parent) Yes No NA

2. Can you provide documents to support your answer if requested by the IRS? (school or medical records showing residency of dependent to match custodial parent) Yes No

3. Have you ever been denied earned income credit or child tax credit in the past? Explain. Yes No

4. Are you filing as Single or Head or Household? (Married filing jointly circle "no") Yes No

If you answered "YES" to 1 and 2, and "NO" to 3 and 4 above, STOP HERE and sign the bottom, otherwise continue.

Is the dependent a qualifying child of another taxpayer? (see note2) Yes No Yes No

If yes, please list who _____

Which parent has the highest adjusted gross income? _____

If child did not live in your home for the entire year, do you have a Form 8332 signed by the custodial parent? Yes No Yes No

If child resides in your home, did you release the custody to another parent for the year to allow them to claim the child? Yes No Yes No

Please provide a copy of school, daycare records, or other equivalent document with child's name and same address. (type of record) _____
(type of record provided) (type of record provided)

Note 1: Child must live with taxpayer for more than half the year. If child lives with both parents who are separated, then the custodial parent is determined by the number of days (nights) at each parents house. If child lives with parents equally, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income for the year

Note 2: Qualifying child of more than one person: Even if a child meets the conditions to be the qualifying child of more than one person, only one person can claim the child as a qualifying child for all of the following tax benefits, unless the special rule for Children of divorced or separated parents applies:

- | | |
|------------------------------------|---|
| 1. Dependency exemption | 4. Credit for child and dependent care expenses |
| 2. Child tax credits | 5. Exclusion for dependent care benefits |
| 3. Head of household filing status | 6. Earned income credit |

 Taxpayer's Signature Date Spouse's Signature Date

Estimated Tax Payments — Tax Year 2023**(Include payments made for 2023 Taxes, not 2022 balance due or payments on prior years balances)**Please provide the following documentation: *Date paid* MM/DD/YYYY *Federal (amount)* *Date paid* MM/DD/YYYY *State (amount)*

	<i>Date paid</i> MM/DD/YYYY	<i>Federal (amount)</i>	<i>Date paid</i> MM/DD/YYYY	<i>State (amount)</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2022 Tax Return overpayment?		\$		\$
Total		\$		\$

Tax Preparation Checklist (list of most common forms, not all inclusive)

- Signed Engagement Letter
- Completed Individual Organizer (this form)
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- All Forms W-2 (wages) (please make sure to include all W2s especially if you changed jobs and may have a small one from the beginning of the year)
- 1099-G (unemployment)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-R (pensions and IRA distributions)
- SSA-1099 (Social Security Income or Social Security Disability Income)
- 1099-B (proceeds from broker or barter transactions),
- Schedules K-1 from partnerships, S corporations, Estates and Trusts,
- 1099-NEC and 1099-MISC Forms from any jobs whether full time or part-time, even Uber or other Gig Economy sources
- 1095-A (health insurance purchased through the marketplace like healthcare.gov)

Additional worksheets if applicable:

- Itemized worksheet (includes state and local taxes, mortgage interest, charity..etc)
- Education worksheet
- Daycare information
- Sole Proprietor worksheet
- Rental worksheet
- Farm worksheet
- Closing statements from sale or purchase of main home, vacation home, rental homes, or investment property.

- If you are a new client, provide copies of last year's tax returns.

NOTES: