ORGANIZER Miscellaneous Questions 2023 1040 US NAME: 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. Did your marital status change during the year? Did your address change during the year? Could you be claimed as a dependent on another person's tax return? Were there any changes in dependents? Did you and your dependents have health care coverage for the full year? Did you receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach. Did you receive any disability income? Did you buy or sell any stocks, bonds, or other investment property? Did you purchase or sell your principal home or second home? Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? Did you install any energy saving improvements such as insulation, doors, windows, and heat pumps, or have a home energy audit performed? Did you purchase a plug-in electric vehicle? Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)? Did you transfer or rollover any amount from one retirement plan to another? Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA? Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? Did you use your car on the job (other than to and from work)? Was your home rented out or used for business? Did you sell, exchange, or dispose of any Digital/Crypto assets? Did you have an interest in or signature or other authority over a financial account in a foreign county, such as a bank account, securities account, or other financial account? Did you contribute or withdraw funds from a Health Savings Account? Did you pay childcare costs for a dependent child under age 13 or costs of caring for a disabled dependent or spouse?

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2023	1040	US	Tax Organizer	
	264 N N EAST L Telepho Fax nur E-mail a	MAIN ST ONGMEAD one number nber: address: tax organize	d Tax Associates Inc. OW MA 01028 : (413) 525-0862 (413) 525-0822 er will assist you in gathering 023 tax return. Please enter	Tax Return Appointment Date: Time: Location: g information necessary for the preparation all pertinent 2023 information.
of: school rec records, place NOTE: If you or social serv	cords or staten cement agency or child is disab vices agency of	nent, landlord o statement, soc pled, please pro r program state	r property management statement, had service records or statement, place vide one of the following forms of provide one of the following forms of	ild is a resident of the United States. This proof is typically in the form lealth care provider statement, medical records, child care provider ce of worship, Indian tribal office statement, or employer statement. poof of disability: doctor statement, other health care provider statement,
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MEDICAL AND DENTAL EXPENSES	
Prescription medicines and drugs	
Doctors, dentists and nurses	
Hospitals and nursing homes	
Insurance premiums	
Long-term care premiums - taxpayer	
Long-term care premiums - spouse	
Insurance reimbursement	
Out-of-pocket lodging and transportation expenses	
Number of medical miles	1
Other:	
TAXES PAID	
State income taxes - 1/23 payment on 2022 state estimate	

TAXI	ES PAID (d	continued)		2023 Amount	2022 Amount
State i	income taxes	- paid with 202	2 state extension		
State i	income taxes	- paid with 202	2 state return		-
State i	income taxes	- paid for prior	years and/or to other states		
		-	nent on 2022 city/local estimate .		
City/lo	cal income ta	exes - paid wit	th 2022 city/local extension		
City/lo	cal income ta	axes - paid wit	th 2022 city/local return		
State	and local sale	es taxes (exce	ept autos and special items)		
			es		
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Sales	taxes paid or	n boats, aircra	ft, and other special items		
	•		dence		
			for investment		
] P		erty taxes (incl	uding automobile fees in some states)	Attach Tax Notice	
<u>Ho</u> me	mortgage int	erest and poir	nts paid:		
_ _				Attach Forms 1098	
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Home n	nortgage interest	not on Form 1098	(include name, SSN, & address of payee):		
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Points	not reported	l on Form 109	8 :		
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– Passi	ve interest		margin accounts):		
– Passi CAS	ve interest	IBUTIONS			
– Passi CAS	ve interest	IBUTIONS	or cash or check contributions unless the d	onor maintains a bank record, or a late(s), and contribution amount(s)	written communication
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1=direct	deposit of fed	deral tax refu	nd into ban	k account		<u> </u>	<u> </u>	200 8 2		
	· -								Campa, 11	
1=electro	onic payment	of estimated	tax	• • • • • • • • • • • • • • • • • • • •						
BANK	(INFORM		I	Percent to Deposit					Type of Account	Type of
	Name o	of Bank		(xx.xx)	Routing Num	ber	Account Num	ber	(Table 1)	(Table 2
	<u></u>								_	
2023 E	ESTIMAT	ED TAX /	1040-E	S (6)		·			2022	
Federa	ıl			Amo	unt Paid	Dat	e Paid	TS	2023 Voucher Am	
	ment applied		_						5-111-12-12-12-12-13-13-13-13-13-13-13-13-13-13-13-13-13-	
	er payment						_			
	ter payment.						_			
	ter payment.									
4th quart	ter payment.	• • • • • • • • • • • •	<u></u>							
	Additional Es Tax Paym									
Paid with	n extension						.	ask Million	Congress.	10.000
Former s	pouse SSN if j	joint estimate:	s							02000
State				Amo	unt Paid	Dat	e Paid	TS	2023 Voucher Ame	ount
Overpayn	nent applied fi	rom 2022	Г			. pulling - paint		200		1 12 julie
1st quarte	er payment									
2nd quarl	ter payment .									-
3rd quarte	er payment		[<u>-</u>		-	
4th quarte	er payment	· · · · · · · · · · · · · · · · · · ·	<u></u> [-
			\Box							
	Additional Es									
	Tax Paym	nents								
								- 100	1116.00	113.410
Paid with	extension	• • • • • • • • • • • • •	L							
	1	Type of Acc	ount		2	Type of	Investment			
		1 = Savings 2 = Checking			1 = Checking or sav 2 = Taxpayer's IRA 3 = Spouse's IRA (r 4 = Health savings a 5 = Archer MSA	rings (default) (next year limits) next year limits)	6 = Coverdell s 7 = Other	avings account (IRA (current year RA (current year		

23	1040	US	Business Income (Schedul	e C)	No.	16
	Please en	ter all pert	tinent 2023 amounts. Last year's amou	nts are provided fo	or your reference).
GEN	IERAL IN	FORMA ¹	TION			
Princip	pal business/p	rofession				
Busine	ess name, if d	ifferent from	Form 1040			
Busine	ess address, it	different from	m Form 1040			
-						
			0			
			1040			
					-	
-	_			· · · · · ·		
Other	accounting me	ethod				
			accrual			1400
	_		ver cost/market, 3=other			
				·		
			usiness			
			r will you file all required Form(s) 1099: 1=yes, 2=no		26,0 a 1 18,0 a 10 a	
			t tax			
	-					
			erial income producing factor			11.975.01.14
						10.197
			company			
			r commodities	<u> </u>		arangata Salah
					IN DAMAGE OF NEWSFERNS SERVICE	
INC	DIME			2023 Amount	2022 Amou	ınt
	•	•	99-NEC)			
		ces				
Other	income:					
-						
-						<u> </u>
_						
COS	T OF GO	ODS SO	LD			
			 r			
		-				
Other of	costs:					
_		-				
_						
_						
-				-		
	on, at end of th	ne vear				
Invento	ny atenu or u	,	************			

RGANIZER					rage o
2023	1040	US	Business Income (Schedule C) (cont.)	No	16 _{p2}

Please enter all	pertinent 2023 amounts.	Last year's amounts ar	e provided for yo	our reference.
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	2023 Amount	2022 Amount
ccounting		
dvertising		
nswering service		
ad debts from sales or service		
ank charges		
ar and truck expenses (not entered elsewhere)		
ommissions		
ontract labor		
elivery and freight		
ues and subscriptions		
mployee benefit programs		
surance (other than health)		
ortgage interest (paid to banks, etc.)		
ther interest (not entered elsewhere)		
anitorial.		
aundry and cleaning		
egal and professional		
iscellaneous		
ffice expense.		
utside services.		
arking and tolls		****
ension and profit sharing plans - contributions	-	
ension and profit sharing plans - admin. and education costs		
ostage		
rintingent - vehicles, machinery, & equipment (not entered elsewhere)		-
ent - other.	<u> </u>	
epairs.		-
ecurity		
		
upplies		
axes - real estate	- · · · · · · · · · · · · · · · · · · ·	
axes - payroll		-
axes - sales tax included in gross receipts		-
axes - other (not entered elsewhere)		-
elephone		
ools		
ravel		-
eals in full (50%)		
epartment of Transportation meals in full (80%)		
niforms		
tilities		
/ages		
other expenses:		
and expenses.		
	 	

	1040	US	Rental & Royalty Income (Schedule E) No	_ 18
	Please en	ter all perti	inent 2023 amounts. Last year's amounts are provide	ed for your refere	ence.
GEN	IERAL IN	IFORMAT	TION 2023 Amount	2022	Amount
Description of property		erty			
Street address		· ·		''	of Property
CityStateZIP code				2 = Multi-Fa	amily Residence mily Residence
				3 = Vacation 4 = Commer	ı/Short-Term Renta rcial
				5 = Land	
Type of property (see table) Other type of property		-		6 = Royalties 7 = Self-Rer	
	-		L	l	
Percenta	age of ownership	ipancy	1=did not actively participate.		
Percenta if not 10	age of tenant occu 0% (.xxxx)	ipancy	1=real estate professional		
				e	
1=qual	lified joint ver	nture	1≕investment I≃single member limited		
2=passiv	ve royalty		liability company	••	
If requ	ired to file Fo	rm(s) 1099, di	id you or will you file all required Form(s) 1099: 1=yes, 2=no		·
INC	OME		2023 Amount	2022.	Amount
Rents	or royalties re	ceived			
Adverti Associ	ising ation dues		ed only to the rental activity. These include rental agency fees, adver	rtising, and office sup	plies.
	•			rtising, and office sup	plies.
Adverti Associ	ising ation dues			rtising, and office sup	plies.
Adverti Associ Auto a	ising ation dues and travel (not	entered elsev	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii	ising	entered elsev		rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi	ising	entered elsev	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder	isingation dues ation dues and travel (not ng and mainto issions	entered elsevenance	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a	ising	entered elsevenance	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License	ising	entered elsevenance	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag	ising ation dues ation dues and travel (not ng and mainte issions ning and profession es and permit ement fees	entered elsevenance	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a Licenso Manag Miscell	ising	entered elsevenance	where)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga	ising	entered elsevenance	where) etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a Licenso Manag Miscell Mortga Excess	ising	entered elsevenance	where) etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i	ising	entered elsevenance	etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin	ising ation dues and travel (not ng and maint issions ning and profession es and permit mement fees laneous age interest (p s mortgage in interest (not e ng and decora	entered elsevenance	etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair: Supplie	ising	entered elsevenance	where) etc.) etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repairs Supplie Taxes	ising	entered elsevenance	etc.)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repairs Supplie Taxes Taxes	ising	entered elsevenance	etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a Licensi Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair: Supplie Taxes Teleph	ising ation dues ation dues and travel (not ng and mainte issions ning and profession es and permit ement fees laneous age interest (not e ng and decora ontrol ing and electr s real estate other (not e none	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repaire Supplie Taxes Teleph Utilities	ising ation dues ation dues and travel (not ng and mainte issions ning and profession es and permit ement fees laneous age interest (po s mortgage in interest (not e ng and decora ontrol ing and electr s real estate other (not e one	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair Supplie Taxes Taxes Teleph Utilities Wages	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanii Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repaire Supplie Taxes Teleph Utilities	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair Supplie Taxes Taxes Teleph Utilities Wages	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair Supplie Taxes Taxes Teleph Utilities Wages	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.
Adverti Associ Auto a Cleanin Commi Garder Insurar Legal a License Manag Miscell Mortga Excess Other i Paintin Pest co Plumbi Repair Supplie Taxes Taxes Teleph Utilities Wages	ising	entered elsevenance	where) etc.) nere)	rtising, and office sup	plies.

23	1040	US	Rental & Royalty Income	(Sch. E) (cont.)	No.	18
Please	e enter all xpense co	pertinent 2 lumn shou	2023 amounts. Last year's amounts uld only be used for vacation homes	are provided for your re or less than 100% tenan	ference. The ir t occupied re	ndirect ntals.
GEN	IERAL IN	IFORMA [*]	TION			
Foreign	n region				_	
-	-					-
_					_	
OIL	AND GA	S	_	0000 4	2022 Amou	
		_	л.,	2023 Amount	ZUZZ AMOU	nt
			nly)			
	•		ount			
			(-1 if none)			
	•		t, if different (-1 if none)			-
	•		•		·	
			DWELLING UNIT (INCLUDING	VACATION HOME)		
Numbe	er of days ow	ned (if option	al method elected)			
IMDI	DECT E	XPENSES	e			
NOTE	Indirect exp: These inclu	enses are rei: de repairs, in:	ated to operating or maintaining the dwelling u surance, and utilities.	nit.		
Advert	ising					
	_					
Auto a	nd travel (no	t entered else	ewhere)			
Cleani	ng and main	tenance				
	_					
Garder	nina					
Insura	nce			<u> </u>		
Legal a	and profession	onal fees				
-	•					
Manag	ement fees.					
Miscel	laneous					
Mortga	age interest (paid to banks	, etc.)			
Excess	s mortgage ii	nterest				
Other	interest (not	entered elsew	/here)[
Paintir	ng and decor	ating				
Pest c	ontrol					
Plumb	ing and elec	trical				
Repair	's					
Suppli	es					
Taxes	- other (not	entered elsew	here)			
Wages	s and salaries	s				
Other:						
Outer:			ſ		T	
-					<u> </u>	
-	-				1	
-					_	
-						
-	 -					