

2023

1040

US

Miscellaneous Questions

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.

- | YES                      | NO                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have health care coverage for the full year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds, or other investment property?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or sell your principal home or second home?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a plug-in electric vehicle?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell, exchange, or dispose of any Digital/Crypto assets?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 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?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you contribute or withdraw funds from a Health Savings Account?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay childcare costs for a dependent child under age 13 or costs of caring for a disabled dependent or spouse?  |

2023 1040 US Tax Organizer

Accounting and Tax Associates Inc.
264 N MAIN ST
EAST LONGMEADOW MA 01028
Telephone number: (413) 525-0862
Fax number: (413) 525-0822
E-mail address:

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.

CLIENT INFORMATION

Taxpayer

Spouse

Form with fields for Client Information: First name and initial, Last name, Title/suffix, Social security number, Occupation, Date of birth, Date of death, 1=blind, Home phone, Work phone, Work extension, Cell phone, E-mail address.

Address

Form with fields for Address: In care of, Street address, Apartment number, City, State, ZIP code.

DEPENDENTS

Dependent No.

Dependent No.

Form with fields for Dependents (first set): First name, Last name, Title/suffix, Date of birth, Date of death, Date of adoption, Social security number, Relationship, Months lived at home.

Dependent No.

Dependent No.

Form with fields for Dependents (second set): First name, Last name, Title/suffix, Date of birth, Date of death, Date of adoption, Social security number, Relationship, Months lived at home.

Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

**WAGES, SALARIES AND TIPS**

Employer name:

	2023 Amount	2022 Amount
<input type="checkbox"/>	<b>Attach Forms W-2</b>	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**INTEREST INCOME**

Payer name:

<input type="checkbox"/>	<b>Attach Forms 1099-INT</b>	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**DIVIDEND INCOME**

Payer name:

<input type="checkbox"/>	<b>Attach Forms 1099-DIV</b>	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**PENSIONS, IRA AND GAMBLING INCOME**

Payer name:

<input type="checkbox"/>	<b>Attach Forms 1099-R &amp; W-2G</b>	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>	Winnings not reported on W-2G .....	
<input type="checkbox"/>	Total gambling losses .....	

**OTHER GOVERNMENT FORMS - INCOME**

<input type="checkbox"/>	<b>Attach Forms 1099</b>	Form 1099-B - Sales of stock (also include transaction history) .....
<input type="checkbox"/>		Form 1099-MISC - Miscellaneous income .....
<input type="checkbox"/>		Form 1099-K - Merchant card and third party network payments .....
<input type="checkbox"/>		Form 1099-S - Sales of real estate (also include closing statements) .

<input type="checkbox"/>	<b>Attach Forms 1099</b>	
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Taxpayer:

<input type="checkbox"/>	<b>Attach Forms 1099</b>	Form SSA-1099 - Social security benefits .....
<input type="checkbox"/>		Form 1099-G - Unemployment compensation .....
<input type="checkbox"/>		Form 1099-Q (529 Plan) .....
<input type="checkbox"/>		Form 1099-QA/5498-QA (ABLE Accounts) .....

Spouse:

<input type="checkbox"/>	<b>Attach Forms 1099</b>	Form SSA-1099 - Social security benefits .....
<input type="checkbox"/>		Form 1099-G - Unemployment compensation .....
<input type="checkbox"/>		Form 1099-Q (529 Plan) .....
<input type="checkbox"/>		Form 1099-QA/5498-QA (ABLE Accounts) .....

<b>2023</b>	<b>1040</b>	<b>US</b>	<b>Tax Organizer</b>
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**MISCELLANEOUS INCOME**

Taxpayer: Alimony received .....

Spouse: Alimony received .....

Other: \_\_\_\_\_


**RETIREMENT PLAN CONTRIBUTIONS**

Taxpayer: Traditional IRA contributions (1=maximum) .....

Roth IRA contributions (1=maximum) .....

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) .....

Spouse: Traditional IRA contributions (1=maximum) .....

Roth IRA contributions (1=maximum) .....

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) .....

2023 Amount	2022 Amount

**OTHER GOVERNMENT FORMS - DEDUCTIONS**

- Form 1098-E - Student loan interest .....
- Form 1098-T - Tuition and related expenses .....

<b>Attach Forms 1098</b>	

**AFFORDABLE CARE ACT**

- Form 1095-A - Health Insurance Marketplace Statement .....

<b>Attach Forms 1095</b>	

**ADJUSTMENTS TO INCOME**

Taxpayer:

Self-employed health insurance premiums .....

Educator expenses .....

Other adjustments to income:

\_\_\_\_\_

\_\_\_\_\_

Alimony paid - Recipient name & SSN .....

\_\_\_\_\_

\_\_\_\_\_

Spouse:

Self-employed health insurance premiums .....

Educator expenses .....

Other adjustments to income:

\_\_\_\_\_

\_\_\_\_\_

Alimony paid - Recipient name & SSN .....

\_\_\_\_\_

\_\_\_\_\_

**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 .....

Other: \_\_\_\_\_

\_\_\_\_\_

**TAXES PAID**

State income taxes - 1/23 payment on 2022 state estimate .....



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 balance due .....		
1=electronic payment of estimated tax .....		

**BANK INFORMATION**

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

**2023 ESTIMATED TAX / 1040-ES (6)**

**Federal**

	Amount Paid	Date Paid	TS	2023 Voucher Amount
Overpayment applied from 2022 .....				
1st quarter payment .....				
2nd quarter payment .....				
3rd quarter payment .....				
4th quarter payment .....				
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;">Additional Estimated Tax Payments</div>				
Paid with extension .....				
Former spouse SSN if joint estimates .....				

**State**

	Amount Paid	Date Paid	TS	2023 Voucher Amount
Overpayment applied from 2022 .....				
1st quarter payment .....				
2nd quarter payment .....				
3rd quarter payment .....				
4th quarter payment .....				
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;">Additional Estimated Tax Payments</div>				
Paid with extension .....				

**1**      **Type of Account**

1 = Savings  
2 = Checking

**2**      **Type of Investment**

1 = Checking or savings (default)	6 = Coverdell savings account (ESA)
2 = Taxpayer's IRA (next year limits)	7 = Other
3 = Spouse's IRA (next year limits)	8 = Taxpayer's IRA (current year limits)
4 = Health savings account (HSA)	9 = Spouse's IRA (current year limits)
5 = Archer MSA	

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Direct Deposit & Estimates (Form 1040 ES) (cont.)

7.1

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? ..... Yes  No

If "yes" explain any differences in income, deductions, dependents, etc.: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you expect your 2024 withholding to be different from 2023? ..... Yes  No

If "yes" explain any differences: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7.1

Please enter all pertinent 2023 amounts. Last year's amounts are provided for your reference.

### GENERAL INFORMATION

Principal business/profession.....	<input style="width:95%; height:20px;" type="text"/>
Principal business code.....	<input style="width:95%; height:20px;" type="text"/>
Business name, if different from Form 1040.....	<input style="width:95%; height:20px;" type="text"/>
Business address, if different from Form 1040.....	<input style="width:95%; height:20px;" type="text"/>
City, if different from Form 1040.....	<input style="width:95%; height:20px;" type="text"/>
State, if different from Form 1040.....	<input style="width:95%; height:20px;" type="text"/>
ZIP code, if different from Form 1040.....	<input style="width:95%; height:20px;" type="text"/>
Foreign region.....	<input style="width:95%; height:20px;" type="text"/>
Foreign postal code.....	<input style="width:95%; height:20px;" type="text"/>
Foreign country.....	<input style="width:95%; height:20px;" type="text"/>
Employer identification number.....	<input style="width:95%; height:20px;" type="text"/>
Other accounting method.....	<input style="width:95%; height:20px;" type="text"/>

Accounting method: 1=cash, 2=accrual.....	<input style="width:95%; height:20px;" type="text"/>	[REDACTED]
Inventory method: 1=cost, 2=lower cost/market, 3=other.....	<input style="width:95%; height:20px;" type="text"/>	
1=change of inventory method.....	<input style="width:95%; height:20px;" type="text"/>	
1=spouse, 2=joint.....	<input style="width:95%; height:20px;" type="text"/>	
1=first Schedule C filed for this business.....	<input style="width:95%; height:20px;" type="text"/>	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no...	<input style="width:95%; height:20px;" type="text"/>	
1=not subject to self-employment tax.....	<input style="width:95%; height:20px;" type="text"/>	
1=did not "materially participate".....	<input style="width:95%; height:20px;" type="text"/>	
1=personal services is not a material income producing factor.....	<input style="width:95%; height:20px;" type="text"/>	
1=investment.....	<input style="width:95%; height:20px;" type="text"/>	
1=minister's Schedule C.....	<input style="width:95%; height:20px;" type="text"/>	
1=single member limited liability company.....	<input style="width:95%; height:20px;" type="text"/>	
1=trader in financial instruments or commodities.....	<input style="width:95%; height:20px;" type="text"/>	

### INCOME

	2023 Amount	2022 Amount
Gross receipts or sales (Form 1099-NEC).....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Returns and allowances.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Other income:  _____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
_____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
_____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>

### COST OF GOODS SOLD

Inventory at beginning of the year.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Purchases.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Cost of items for personal use.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Cost of labor.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Materials and supplies.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Other costs:  _____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
_____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
_____	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>
Inventory at end of the year.....	<input style="width:95%; height:20px;" type="text"/>	<input style="width:95%; height:20px;" type="text"/>



Please enter all pertinent 2023 amounts. Last year's amounts are provided for your reference.

**EXPENSES**

	2023 Amount	2022 Amount
Accounting.....		
Advertising.....		
Answering service.....		
Bad debts from sales or service.....		
Bank charges.....		
Car and truck expenses (not entered elsewhere).....		
Commissions.....		
Contract labor.....		
Delivery and freight.....		
Dues and subscriptions.....		
Employee benefit programs.....		
Insurance (other than health).....		
Mortgage interest (paid to banks, etc.).....		
Other interest (not entered elsewhere).....		
Janitorial.....		
Laundry and cleaning.....		
Legal and professional.....		
Miscellaneous.....		
Office expense.....		
Outside services.....		
Parking and tolls.....		
Pension and profit sharing plans - contributions.....		
Pension and profit sharing plans - admin. and education costs.....		
Postage.....		
Printing.....		
Rent - vehicles, machinery, & equipment (not entered elsewhere).....		
Rent - other.....		
Repairs.....		
Security.....		
Supplies.....		
Taxes - real estate.....		
Taxes - payroll.....		
Taxes - sales tax included in gross receipts.....		
Taxes - other (not entered elsewhere).....		
Telephone.....		
Tools.....		
Travel.....		
Meals in full (50%).....		
Department of Transportation meals in full (80%).....		
Uniforms.....		
Utilities.....		
Wages.....		

Other expenses:


NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

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Rental & Royalty Income (Schedule E)

No.

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Please enter all pertinent 2023 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

	2023 Amount	2022 Amount
Description of property .....		<b>Type of Property</b> 1 = Single Family Residence 2 = Multi-Family Residence 3 = Vacation/Short-Term Rental 4 = Commercial 5 = Land 6 = Royalties 7 = Self-Rental
Street address .....		
City .....		
State .....		
ZIP code .....		
Type of property (see table) ....		
Other type of property .....		
Number of days rented .....	34	

Percentage of ownership if not 100% (.xxxx) .....		1=did not actively participate ...	
Percentage of tenant occupancy if not 100% (.xxxx) .....		1=real estate professional .....	
1=spouse, 2=joint .....		1=rental other than real estate ..	
1=qualified joint venture .....		1=investment .....	
1=nonpassive activity, 2=passive royalty .....		1=single member limited liability company .....	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no .....			

INCOME

	2023 Amount	2022 Amount
Rents or royalties received .....		

DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

	2023 Amount	2022 Amount
Advertising .....		
Association dues .....		
Auto and travel (not entered elsewhere) .....		
Cleaning and maintenance .....		
Commissions .....		
Gardening .....		
Insurance .....		
Legal and professional fees .....		
Licenses and permits .....		
Management fees .....		
Miscellaneous .....		
Mortgage interest (paid to banks, etc.) .....		
Excess mortgage interest .....		
Other interest (not entered elsewhere) .....		
Painting and decorating .....		
Pest control .....		
Plumbing and electrical .....		
Repairs .....		
Supplies .....		
Taxes - real estate .....		
Taxes - other (not entered elsewhere) .....		
Telephone .....		
Utilities .....		
Wages and salaries .....		
Other:		
_____		
_____		
_____		
_____		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

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Rental & Royalty Income (Sch. E) (cont.)

No.

18 p2

Please enter all pertinent 2023 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

GENERAL INFORMATION

Foreign region.....
Foreign postal code.....
Foreign country.....

Table with 2 columns for foreign region, postal code, and country.

OIL AND GAS

Production type (preparer use only).....
Cost depletion.....
Percentage depletion rate or amount.....
State cost depletion, if different (-1 if none).....
State % depletion rate or amount, if different (-1 if none).....

Table with 2 columns: 2023 Amount, 2022 Amount. Rows for production type, cost depletion, percentage depletion, state cost depletion, and state % depletion.

PERSONAL USE OF DWELLING UNIT (INCLUDING VACATION HOME)

Number of days personal use.....
Number of days owned (if optional method elected).....

Table with 2 columns for days personal use and days owned.

INDIRECT EXPENSES

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

Advertising.....
Association dues.....
Auto and travel (not entered elsewhere).....
Cleaning and maintenance.....
Commissions.....
Gardening.....
Insurance.....
Legal and professional fees.....
Licenses and permits.....
Management fees.....
Miscellaneous.....
Mortgage interest (paid to banks, etc.).....
Excess mortgage interest.....
Other interest (not entered elsewhere).....
Painting and decorating.....
Pest control.....
Plumbing and electrical.....
Repairs.....
Supplies.....
Taxes - real estate.....
Taxes - other (not entered elsewhere).....
Telephone.....
Utilities.....
Wages and salaries.....

Table with 2 columns for indirect expenses. Rows for advertising, association dues, auto and travel, cleaning and maintenance, commissions, gardening, insurance, legal and professional fees, licenses and permits, management fees, miscellaneous, mortgage interest, excess mortgage interest, other interest, painting and decorating, pest control, plumbing and electrical, repairs, supplies, taxes - real estate, taxes - other, telephone, utilities, and wages and salaries.

Other:

Handwritten lines for other indirect expenses.

Table with 2 columns for other indirect expenses.