Tax Time LLC - Roger Nickell CPA 2023 Individual Taxpayer Organizer

Electronic Completion REQUIRES Download and Save As to Save Entered Data

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Existing Clients (Prepared Prior Year Return)

Confirm items have NOT Changed

Complete Pages 2 and 3

Confirm/Check No Changes to list below:

Marital Status Address

Phone E-Mail

Dependents Bank Account Please note that any information *not complete or provided* could **delay** the processing of your Income Tax Return.

Providing and Sharing Information

Electronic Client Folder on Secure Client Portal to share and review documents electronically and provide Tax Returns and Information. (Required for Electronic Copies & Documents)

Accept use of Electronic Folder Initials

Income Tax Return Copy Preference

Electronic Copy Paper Copy

New	Clients

• Complete All Information below & Page 2 & 3

Copy of Prior Year Tax Return

Copy of Drivers License

Taxpayer						SSN-Tax ID					
First Name	M.I.	Last	Name	Ema	il			P IN			
Occupation		Date o	of birth			Are you nev	v to our fir	m?	Yes	No	
Address		City				State	Z	ip			
County		Prima	ry phone			Secondary p	Secondary phone				
Driver's License No.				State	Issue	Date	Ехр. С	ate			
Spouse						SSN-Tax ID					
First Name	M.I.	Last	Name	Ema	il			P IN			
Occupation		Date o	Date of birth			Are you nev	v to our fir	m?	Yes	No	
Address (If different from Taxpayer)		City	City			State	Z	ip			
County		Prima	Primary phone Sec			Secondary p	Secondary phone				
Driver's License No.		1		State	Issue	Date	Ехр. С	ate			
If you moved during 2023, enter your	f you moved during 2023, enter your previous address. Date of m			Date of mov	ate of move						
Were you divorced or separated durir Individuals who are in registered don Have you received any notice from th	nestic partnership	os (RDP	s) and civil un	ions a	re not consid	deaths in the fan dered married for Yes No	-				
Names of dependent children Child's full name	SSN-Tax		IP PIN		Date of birt. mm/dd/yyy	h Months lived		nship to payer		ollege ıdent?	
Did any of the children have unearned Is it anticipated that a different taxpay			•			of the children ha ent for tax year 2			Yes	No	
Other dependents or people who liv	ed with you										
Name	SSN-Tax ID	#*	IP PIN		ate of birth m/dd/yyyy	Months lived in home in 2023	Relations	ship	Inco	оте	
Paul in formation, U. C. D. 1	an acit of motion 1	D:	r 4 -11		10 N C	la quele					
	eposit of refund	Direc	t debit of balar	ice at	1						
Checking Savings Routing tra	nsit number				Account nu	muer					
A Tay ID# is either a Social Security Numb	or (SSM) adoption	tavnavo	r identification n	umbo	r (ATINI) or a	a individual taypay	or identifie	tion nu	mbor	(ITINI)	

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question. Are either you or your spouse legally blind? No Recipient's SSN Date of divorce or separation Yes Did you pay or receive alimony in 2023? Received Did you purchase health insurance through a public exchange? Yes No Yes No Will there be any significant changes in income or deductions next year, such as retirement? LIFESTYLE & TAXES Yes No Did you pay anyone for domestic services in your home? Yes No Did you purchase a new energy-efficient car, truck, or van? Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? Yes No Yes No Are you a member of the military? State of residency Yes No Were you a citizen of or lived in a foreign country? Foreign country Yes Do you own or have financial interest in a foreign bank or financial account? Maximum value \$ Would you like to allow your tax preparer or another person to discuss your return with the IRS? Yes No Designee's name Phone number PIN (any five digits) Yes Were any children born or adopted in 2023? (Provide statement for other expenses.) No Yes No Were any children attending college? (Provide Form 1098-T.) Year in college Paid by you: Tuition \$ Student loan interest \$ Books \$ Paid by student: Tuition \$ Student loan interest \$ Books \$ CHILDREN & EDUCATION Did you pay any tuition for a private school for a dependent or take classes yourself? Yes No Amount paid \$ Name and address of school Yes No Did you pay for child or dependent care so you could work or go to school? (add statement if needed) Name of provider EIN or SSN Address Amount paid \$ Do you have any children who have unearned income of \$1,250 or more? Yes No Provide Statement and/or Amount \$ Yes No Did you make any contributions to a 529 plan in 2023? Yes No Did you, or will you, contribute any money to an IRA for 2023? Traditional IRA Roth IRA Yes No Did you roll over any amounts from a retirement account in 2023? Yes No Did you sell or transfer any stock or sell rental or investment property? INVESTMENTS Did you receive any income from an installment sale? Yes No Yes No Did you have any investments become worthless or were you a victim of investment theft in 2023? Yes No Were you granted, or did you exercise, any employee stock options during 2023? No Buy/Sell Virtual Currency (i.e. Bitcoin)? Did you (a) receive (as a reward, award, or payment for property or Yes services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes Did you, or do you plan to, contribute money before April 15, 2024 to an HSA for 2023? If yes, provide details. DEDUCTIONS 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 in 2023, such as a vehicle, boat, or home? Yes No Did you make any charitable contributions in 2023? If yes, provide details. Yes No Did you work from a home office or use your car for business? BUSINESS Yes Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)? No Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? Yes No Yes No Did you purchase or sell a main home during the year? If yes, provide closing statement. If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details. Yes No Yes No Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement. Yes No Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home? Did you make any new energy-efficient improvements to your home? If yes, provide details. Yes No Part-year resident Nonresident School district State information Full-year resident States of residence during 2023 and dates Do you rent or own your home? Rent Own Total rent paid \$ Includes heat? Yes No

Estimated Tax Payments — Tax Year 2023					
Installment	Date paid	Federal	Date paid	State	
First		\$		\$	
Second		\$		\$	
Third		\$		\$	
Fourth		\$		\$	
Amount applied from 2022 overpayment?		\$		\$	
Total		\$		\$	

Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).

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

The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."

Copy of the closing statement if you bought, sold, or refinanced real estate.

Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage. Detail of estimated tax payments made, if any.

Income and deductions categorized on a separate sheet for business or rental activities.

List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions. Copy of all acknowledgement letters received from charitable organizations for contributions made in 2023.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer	Spouse	Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.