FROM

TRACEY S. PETERS, CPA, LLC
4833 ELLICOTT WOODS LANE
ELLICOTT CITY, MD 21043

2023 TAX ORGANIZER

TO

EXAMPLE CLIENT

This tax organizer has been prepared for your use in gathering the information needed for your 2023 tax return.

To save you time, selected information from your 2022 tax return has been entered in this organizer. Please line through any information that does not apply to your 2023 tax return.

In some cases, 2022 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.

If we may be of further assistance, please contact us at your convenience.

(410) 418-9111

REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER

Questions (Page 1 of 5)

The following questions pertain to the 2023 tax year. For any question answered Yes, include supporting detail or documents.

Personal Information:	**Yes**	**No**
Did your marital status change?	_____	_____
Are you married?	_____	_____
If Yes, do you and your spouse want to file separate returns?	_____	_____
If No, are you in a domestic partnership, civil union, or other state-defined relationship?	_____	_____
Can you or your spouse be claimed as a dependent by another taxpayer?	_____	_____
Did you or your spouse serve in the military or were you or your spouse on active duty?	_____	_____

Dependents:

Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support.	_____	_____
Did you or your spouse pay for child care while you or your spouse worked or looked for work?	_____	_____
Do you have any children under age 18 with unearned income more than $1,250?	_____	_____
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,250?	_____	_____
Did you adopt a child or begin adoption proceedings?	_____	_____
Are any of your dependents non-U.S. citizens or non-U.S. residents?	_____	_____

Healthcare:

Did you obtain healthcare coverage through the Marketplace?	_____	_____
If Yes, include all Forms 1095-A.		
If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment?	_____	_____
Did you, your spouse, or a dependent have healthcare purchased through the Marketplace and for whom you did not receive Form 1095-A?	_____	_____
Did you receive Form 1095-A for someone claimed as a dependent on another taxpayer's return or who is filing their own return and is not claimed on another taxpayer's return?	_____	_____
Are any of your dependents required to file a tax return?	_____	_____

Questions (Page 2 of 5)

Healthcare (continued): **Yes** **No**

Was anyone covered on your health insurance policy also covered on another health insurance policy for any part of the year? _____ _____

Were you eligible for employer-sponsored healthcare coverage? _____ _____

Did you or your spouse have any transactions pertaining to a health savings account (HSA)? _____ _____
If you received a distribution from an HSA, include all Forms 1099-SA.
Did you or your spouse have any transactions pertaining to a medical savings account (MSA)? _____ _____
If you received a distribution from an MSA, include all Forms 1099-SA.
Did you or your spouse receive any distributions from long-term care insurance contracts? _____ _____
If Yes, include Forms 1099-LTC.

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? _____ _____

If Yes, how many months were you covered? ________

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job? _____ _____

If Yes, how many months were you covered? ________

Education:

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? _____ _____

Did you or your spouse pay any student loan interest? _____ _____

Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren? _____ _____

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan? _____ _____

If Yes, include all Forms 1099-Q.
If Yes, were the amounts withdrawn used for qualified tuition expenses? _____ _____

Deductions and Credits:

Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization? _____ _____
If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.

Did you or your spouse incur any casualty or theft losses? _____ _____

Did you or your spouse make any large purchases, such as motor vehicles and boats? _____ _____

Did you or your spouse incur any casualty or loss attributable to a federally declared disaster? _____ _____

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle? _____ _____
Did you or your spouse use gasoline or special fuels for business or farm purposes (other than for a highway vehicle)? _____ _____

If Yes, provide the number of gallons or special fuels used for off-highway business purposes.
________ Gallons ________ Type

Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells? _____ _____

Did you or your spouse install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters? _____ _____

Questions (Page 3 of 5)

Investments:	**Yes**	**No**
Did you or your spouse have any debts canceled, forgiven or refinanced?	_____	_____
Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?	_____	_____
Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?	_____	_____
Did you or your spouse sell, exchange, or purchase any real estate?	_____	_____
If Yes, include closing statements.		
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?	_____	_____
Did you or your spouse engage in any put or call transactions?	_____	_____
If Yes, provide the transaction details.		
Did you or your spouse close any open short sales?	_____	_____
Did you or your spouse sell any securities not reported on Form 1099-B?	_____	_____
Retirement or Severance:		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?	_____	_____
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?	_____	_____
Did you or your spouse turn age 73 and have money in an IRA or other retirement account without taking any distribution?	_____	_____
Did you or your spouse make a qualified charitable distribution directly from an IRA?	_____	_____
Did you or your spouse retire or change jobs?	_____	_____
Did you or your spouse receive deferred, retirement or severance compensation?	_____	_____
If Yes, enter the date received (Mo/Da/Yr). ____________		
Personal Residence:		
Did your address change?	_____	_____
If Yes, provide the new address.		
If Yes, did you move to a different home because of a change in the location of your job?	_____	_____
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	_____	_____
Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?	_____	_____
Are your total mortgages on your first and/or second residence greater than $750,000?	_____	_____
If Yes, provide the principal balance and interest rate at the beginning and end of the year. _________________		
Did you or your spouse take out a home equity loan?	_____	_____
Did you or your spouse have an outstanding home equity loan at the end of the year?	_____	_____
If Yes, provide the principal balance and interest rate at the beginning and end of the year. _________________		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?	_____	_____
Did you or your mortgagee receive mortgage assistance payments? If Yes, include all Forms 1098-MA.	_____	_____

Questions (Page 4 of 5)

Sale of Your Home:	**Yes**	**No**
Did you sell your home?	_____	_____
Did you receive Form 1099-S?	_____	_____
If Yes, include Form 1099-S.		
Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?	_____	_____
Did you or your spouse ever rent out the property?	_____	_____
Did you or your spouse ever use any portion of the home for business purposes?	_____	_____
Have you or your spouse sold a principal residence within the last two years?	_____	_____
At the time of the sale, the residence was owned by the: ________ Taxpayer ________ Spouse ________ Both		

Gifts:

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of $17,000 to any individual?	_____	_____
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?	_____	_____
Did you or your spouse make any gifts to a trust for any amount?	_____	_____
Did you or your spouse have a life insurance trust?	_____	_____
Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?	_____	_____
Did you or your spouse forgive any indebtedness to any individual, trust or entity?	_____	_____

Foreign Matters:

Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?	_____	_____
Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?	_____	_____
Did you or your spouse create or transfer money or property to a foreign trust?	_____	_____
Did you or your spouse own any foreign financial assets?	_____	_____
Were you or your spouse subject to the transition tax on undistributed foreign income and elect to pay the tax in installments?	_____	_____
Did you or your spouse have an interest in an S corporation that had undistributed foreign income subject to the transition tax?	_____	_____
If Yes, did the corporation cease to be an S corporation?	_____	_____
If Yes, was there a sale or liquidation of substantially all of the corporation's assets or did the corporation cease business?	_____	_____
If Yes, did you or your spouse transfer any share of stock in the corporation?	_____	_____

Questions (Page 5 of 5)

Miscellaneous:	Yes	No
Did you or your spouse pay in excess of $1,000 in any quarter or $2,600 during the year for domestic services performed in or around your home to individuals who could be considered household employees?	_____	_____
Did you or your spouse receive unreported tip income of $20 or more in any month?	_____	_____
Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness?	_____	_____
Did you or your spouse engage in any bartering transactions?	_____	_____
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	_____	_____
For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?	_____	_____
In 2023, did you or your spouse: (a) receive (as a reward, award, or compensation); (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	_____	_____
In 2023, did you or your spouse receive Payroll Protection Program loan forgiveness or are you or your spouse seeking forgiveness?	_____	_____
If No, enter the date loan forgiveness was denied or that you or your spouse decided not to seek forgiveness. Date (Mo/Da/Yr) ___________		
If No, enter the amount of the loan for which forgiveness was denied or the amount of the loan for which you or your spouse decided not to seek forgiveness. Amount ________________		
Do you own an interest in an LLC or similar entity that has a reporting obligation under the Corporate Transparency Act?	_____	_____

Additional state pages have been included at the back of the organizer and should be reviewed.

2023

Personal Information

Taxpayer:

EXAMPLE	CLIENT	ON FILE
First Name and Initial	Last Name	Social Security Number

Occupation ______ Date of Birth (Mo/Da/Yr) ______ Date of Death (Mo/Da/Yr) ______

Driver's License or State-Issued ID Number ______ Expiration Date (Mo/Da/Yr) ______ Issue Date (Mo/Da/Yr) ______ State ______ ☐ Does not expire

☐ Driver's License ☐ State-Issued ID ☐ No Identification

Spouse:

First Name and Initial ______ Last Name ______ Social Security Number ______

Occupation ______ Date of Birth (Mo/Da/Yr) ______ Date of Death (Mo/Da/Yr) ______

Driver's License or State-Issued ID Number ______ Expiration Date (Mo/Da/Yr) ______ Issue Date (Mo/Da/Yr) ______ State ______ ☐ Does not expire

☐ Driver's License ☐ State-Issued ID ☐ No Identification

Contact Information:

Street Address ______ Apartment Number ______

City ______ State ______ ZIP or Postal Code ______

Foreign Province or County ______

Foreign Country ______

Taxpayer Daytime/Work Phone ______ Taxpayer Evening/Home Phone ______ Taxpayer Foreign Phone ______

Taxpayer Cell Phone ______ Taxpayer Fax Number ______

Spouse Daytime/Work Phone ______ Spouse Evening/Home Phone ______ Spouse Foreign Phone ______

Spouse Cell Phone ______ Spouse Fax Number ______

Taxpayer Email Address ______

Spouse Email Address ______

Preferred Method of Contact ______

	Yes	No
May the IRS or other taxing authority discuss the return with the preparer?	X	
Is the taxpayer claimed as a dependent on someone else's tax return?		

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Are you considered legally blind per IRS regulations?				
Do you want to contribute to the Presidential Election Campaign Fund?				
Are you a U.S. citizen or Green Card holder?				

Personal Identification Numbers: Code - 1 - Issued by IRS 2 - Issued by State or City

The IRS has recommended that taxpayers have an Identity Protection (IP) PIN to increase filing security. If you would like an IP PIN for yourself, your spouse, or your dependents or have one but do not know the IP PIN assigned, visit IRS.gov to retrieve it or apply.

TS	State	City	Code	PIN

Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.

2023

Dependents and Wages

3A

Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						
H						

Did dependent have income over $4,700?

	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				
H				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.

Wages and Salaries:

Include all copies of your current year Forms W-2

Note: Use this section to report any wages and/or salaries for which no Form W-2 was received.

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER 1	Medicare	State	Local

Worksheets: Basic Data > General and Dependents; Wages, Salaries and Tips; Rel/Rev of Claim to Exemption for Child (Form 8332)
Forms 1, 1A, IRS-W2 and S-37

2023

Electronic Filing

4

Electronic Filing:

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. The IRS has implemented an electronic filing mandate requiring certain preparers, including this firm, to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

Do not electronically file the federal return . . . . ☐

Do not electronically file the state return(s) . . . . ☐

Note: The IRS and some states that require returns to be electronically filed also impose fees and/or penalties for failure to do so. If you checked either of the boxes above, you may be required to sign an "opt-out" form before we can release your returns. As a follow-up we will contact you to discuss these requirements and your ability to "opt-out" of electronic filing.

The IRS requires, and many states allow, the use of a Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?	Yes	No
Taxpayer		
Spouse		

If No, enter a 5-digit self-selected PIN:

Taxpayer PIN . . . . ____________

Spouse PIN . . . . ____________

2023

Interest Income

5A

Interest Information:

Include copies of all Forms 1099-INT or other documents for interest received

Tax-Exempt Interest Code: 1 - 1099-INT 2 - Private Activity Bond 3 - Both

TSJ	Name of Payer	Interest Income	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	2022 Interest Amount
	Total					

Seller-Financed Mortgage Interest Information:

Name of Individual from Whom Mortgage Interest Was Received	Identification Number of Individual	2023 Interest Amount	2022 Interest Amount

Address of Individual from Whom Mortgage Interest Was Received

Enter Any Additional Information:

Note: List all items sold during the year on Form 7.

2023

Dividend Income

5B

Dividend Information:

Include copies of all Forms 1099-DIV or other documents for dividends received

	TSJ	Name of Payer	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Total Capital Gain Distribution	U.S. Bond Interest Amount or Percent in Box 1a
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
		Total				

Tax-Exempt Interest Code: 1 - 1099-DIV 2 - Private Activity Bonds 3 - Both

	Code	Tax-Exempt Interest	2022 Gross Dividends Amount
A			
B			
C			
D			
E			
F			
G			
H			
I			
J			
K			
L			
M			
N			
Total			

Enter Any Additional Information:

Note: List all items sold during the year on Form 7.

2023

Sales of Stocks, Securities, Capital Assets & Installment Sales

7

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Include all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?

	Yes	No
Mutual fund transactions		
Exchange of any securities or investments for something other than cash		
Sales of inherited property		
Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale		
Commodity sales, short sales or straddles		
Reinvestment of the proceeds of gains in a qualified opportunity fund		
Sale of any investments in qualified opportunity funds		
Debts that became uncollectible		
Securities that became worthless		
Sale of any property where you will receive payments in future years		

	TSJ	Kind of Property and Description	Quantity	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)
A					
B					
C					
D					
E					
F					
G					
H					

	Gross Sales Price (Less Commissions)	Cost or Other Basis	Federal Tax Withheld	State Tax Withheld
A				
B				
C				
D				
E				
F				
G				
H				

Installment Sales:

Do not include interest received in principal amount

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2023 Principal Received	2022 Principal Received

2023

Individual Retirement Account (IRA) Information

Individual Retirement Account (IRA): **Include all copies of Forms 1099-R and 5498.**

TS . . . . ____

IRA Questions for 2023:

	Yes	No
Are you covered by an employer's retirement plan?		
If no, is your spouse covered by an employer's retirement plan?		
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?		
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?		
Did you use any IRA as security for a loan this year?		
Did you have any transactions with any IRA during the year?		

If Yes, explain. ______________________________

IRA Values, Rollovers, and Distributions:

Total value of all traditional IRAs on December 31, 2023 . . . . ______

Note: This information or Form 5498 is required if you received a distribution during the year.

Outstanding rollovers on December 31, 2023 . . . . ______

Total distributions converted to Roth IRAs . . . . ______

Total retirement plans converted to Roth IRAs . . . . ______

Contributions:

IRA:

Contributions in 2023 for the 2023 tax return . . . . ______

Contributions in 2024 for the 2023 tax return . . . . ______

Amount for 2023 you choose to be treated as nondeductible . . . . ______

Roth IRA:

Contributions made for the 2023 tax year . . . . ______

Distributions: **Include all Forms 1099-R and any nontaxable distribution details**

Name of Payer	2023 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	2022 Gross Distributions

2023

Miscellaneous Income, Adjustments and Alimony

13

Include Forms: W-2G, 1099-MISC, 1099-NEC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-QA, and 1099-G

Miscellaneous Income and Adjustments:

	TSJ ____		TSJ ____	
	2023 Amount	2022 Amount	2023 Amount	2022 Amount
Unemployment compensation received				
Unemployment compensation repaid in 2023				
Social security benefits received				
Social security benefits repaid in 2023				
Medicare premiums withheld				
Tier 1 railroad retirement benefits received				
Tier 1 railroad retirement benefits repaid in 2023				
Total lump sum social security received				
Lump sum taxable social security				
Other federal withholding				
Other state withholding				

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

Other Income:

TSJ	Nature and Source	2023 Amount	2022 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security Number	Date of Original Divorce or Separation (Mo/Da/Yr)	Date Divorce or Separation Agreement Modified (Mo/Da/Yr)	Alimony Received?	2023 Amount	2022 Amount

2023

Miscellaneous Adjustments

13A

Educator Expenses: Deduction for amounts paid by educators of kindergarten through Grade 12

TS	2023 Amount	2022 Amount

Health Savings Accounts (HSAs) Include all Forms 1099-SA

TS	Description	2023 Amount	2022 Amount
	Contributions made for 2023		
	Distributions received from all HSAs in 2023		

What type of coverage applies to your high deductible health plan? ☐ Self only ☐ Family

	Yes	No
Were any HSA contributions listed above also shown on your Form W-2?		
Were all distributions from your HSA for unreimbursed medical expenses?		
Did you or your spouse enroll in Medicare?		

If Yes, what month did you enroll? ______

What month did your spouse enroll? ______

Other Adjustments to Income: Include all Forms 1098-E for Student Loan Interest Paid

TSJ	Nature and Source	2023 Amount	2022 Amount

2023

Itemized Deductions - Medical and Taxes

14

Medical and Dental Expenses:

	TSJ	2023 Amount	2022 Amount
Prescription medicines and drugs			
Total medical insurance premiums paid *			
Long-term care expenses			
Total insurance reimbursement			
Number of miles traveled for medical care			
Personal protective equipment			
Lodging			
Doctors, dentists, etc.			
Hospitals			
Lab fees			
Eyeglasses and contacts			

	2023 Amount	2022 Amount
Taxpayer long-term care insurance premiums paid		
Spouse long-term care insurance premiums paid		

* Do not include Medicare premiums or premiums deducted in computing taxable wages reported on a W-2.

Other Medical Expenses:

TSJ	Description	2023 Amount	2022 Amount

Taxes Paid: Include copies of your tax bills

	TSJ	2023 Amount	2022 Amount
Personal property taxes paid (include vehicle taxes)			
General sales taxes paid on specified items			

Itemize real estate taxes by state.

TSJ	Real Estate Taxes	2023 Amount	2022 Amount

Other Taxes Paid:

TSJ	Description	2023 Amount	2022 Amount

If you purchased or sold your home in 2023, did you include any taxes from your closing statement in the amounts above? ☐ Yes ☐ No

2023

Itemized Deductions - Mortgage Interest and Points

14A

Mortgage Questions for 2023:

	Yes	No
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below?		
Did you refinance your home? (If Yes, enclose the closing statement.)		
If Yes, how many years is your new mortgage loan?		
Did you purchase a new home or sell your former home during the year?		
If Yes, enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you (or your spouse, if married) have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home?		
If Yes, did you (and your spouse, if married at the time of purchase) own and use the same home as a principal residence in the U.S. for any 5 consecutive year period during the 8 year period ending on the purchase date of the new home?		

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid To	Did You Receive Form 1098? Yes	No	2023 Amount	2022 Amount

Other Home Mortgage Interest Paid:

TSJ	Paid To: Name	Address	ID Number	2023 Amount	2022 Amount

SAMPLE

Deductible Points:

TSJ	Paid To	Did You Receive Form 1098? Yes	No	2023 Amount	2022 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2023 Amount	2022 Amount

2023

Itemized Deductions - Contributions

Cash Contributions: Include all Forms 1098-C or other documentation.

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than $500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity.

TSJ	Organization or Description of Contribution	2023 Amount	2022 Amount

TSJ	Conservation Real Property	2023 Amount	2022 Amount
	100% limit		
	50% limit		

TSJ	Description	2023 Miles	2022 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		

Noncash Contributions Totaling $500 or Less: Include all documentation.

TSJ	Description of Donated Property	2023 Amount	2022 Amount

Noncash Contributions Totaling More Than $500: Include all Forms 1098-C or other documentation.

	TSJ	Property Description	Date Acquired	Date of Donation	Cost or Basis
A					
B					
C					

	Fair Market Value (FMV)	Method Used to Determine FMV	Other Method Description	Method of Acquisition
A				
B				
C				

1 - Appraisal 3 - Comparable Sale 5 - Thrift Shop Value
2 - Catalog 4 - Other (Describe)

1 - Gift 3 - Exchange
2 - Inheritance 4 - Purchase

	Donee Organization Name	Donee Organization Address
A		
B		
C		

2023

Itemized Deductions - Miscellaneous

16

* These expenses are not deductible on the federal return but may be deductible on some state returns.

Miscellaneous Itemized Deductions:

	TSJ	2023 Amount	2022 Amount
Union and professional dues *			
Tax preparation fee *			
Professional subscriptions *			
Hobby expense (To extent of income) *			
Safe deposit box *			
Uniforms and protective clothing *			
Work tools *			
Gambling losses			
Estate taxes			

Other Itemized Deductions:

Examples:

- Certain legal and accounting fees *
- Investment expenses *
- Custodial fees *
- Employment agency fees *
- Certain educational expenses *
- Amortizable bond premium
- Impairment-related work expense of a disabled person
- Repayment of amounts under a claim of right

TSJ	Description	2023 Amount	2022 Amount

Casualty or Theft Loss:

TSJ . . . . ____

Property description . . . . ____

Which of the following describes the type of property that sustained the casualty or theft loss?

☐ Personal use ☐ Business use ☐ Income producing ☐ Employee Use ☐ Personal use attributable to insolvent or bankrupt financial institution losses on deposits

Was the loss due to a federally declared disaster? . . . . ☐ Yes ☐ No

Date acquired . . . . (Mo/Da/Yr) ____

Date damaged or lost . . . . (Mo/Da/Yr) ____

Original cost or other basis . . . . ☐

Fair market value before casualty . . . . ☐

Fair market value after casualty . . . . ☐

Cost of replacement . . . . ☐

Insurance reimbursement . . . . ☐

2023

Federal Tax Payments

Refund Application:

If you have an overpayment of 2023 taxes, do you want the excess:

Refunded	☐ Yes	☐ No
Applied to your 2024 estimated tax liability	☐ Yes	☐ No

Federal Estimated Tax Payments:

		Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2023 1st Quarter Estimate	(Due 04-18-2023)			
2023 2nd Quarter Estimate	(Due 06-15-2023)			
2023 3rd Quarter Estimate	(Due 09-15-2023)			
2023 4th Quarter Estimate	(Due 01-16-2024)			

2022 overpayment applied to 2023 estimate . . . . ☐

Tax Planning Information for Tax Year 2024:

Do you expect any of the following to occur in 2024?

	Yes	No
A change in your marital status	☐	☐
A change in the number of your dependents	☐	☐
A substantial change in your income	☐	☐
A substantial change in your withholding	☐	☐
A substantial change in deductions	☐	☐

If you answered Yes to any of the above questions, provide details.

2023

State and City Tax Payments

20A

State and City Estimated Tax Payments:

TSJ ___
State/City ____________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2023 1st Quarter Estimate			
2023 2nd Quarter Estimate			
2023 3rd Quarter Estimate			
2023 4th Quarter Estimate			

If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax liability? ☐ Yes ☐ No

2022 overpayment applied to 2023 estimate	
Balance of prior year(s)' tax paid in 2023 plus amount paid with 2022 extensions	
Estimated tax payments for 2022 paid in 2023	

State and City Estimated Tax Payments:

TSJ ___
State/City ____________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2023 1st Quarter Estimate			
2023 2nd Quarter Estimate			
2023 3rd Quarter Estimate			
2023 4th Quarter Estimate			

If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax liability? ☐ Yes ☐ No

2022 overpayment applied to 2023 estimate	
Balance of prior year(s)' tax paid in 2023 plus amount paid with 2022 extensions	
Estimated tax payments for 2022 paid in 2023	

State and City Estimated Tax Payments:

TSJ ___
State/City ____________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2023 1st Quarter Estimate			
2023 2nd Quarter Estimate			
2023 3rd Quarter Estimate			
2023 4th Quarter Estimate			

If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax liability? ☐ Yes ☐ No

2022 overpayment applied to 2023 estimate	
Balance of prior year(s)' tax paid in 2023 plus amount paid with 2022 extensions	
Estimated tax payments for 2022 paid in 2023	