

2023	1040	US	Tax Organizer
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Bayerkohler Ltd
 11132 Zealand Ave N
 Champlin MN 55316
 Telephone number: 763-762-4401
 Fax number: 763-762-4418
 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

First name and initial		
Last name		
Title/suffix		
Social security number		
Occupation		
Date of birth (m/d/y)		
Date of death (m/d/y)		
1=blind		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	

DEPENDENTS

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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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:

Form with 4 rows for Employer name input.

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms W-2' in the 2023 column.

INTEREST INCOME

Payer name:

Form with 4 rows for Payer name input.

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099-INT' in the 2023 column.

DIVIDEND INCOME

Payer name:

Form with 4 rows for Payer name input.

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099-DIV' in the 2023 column.

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

Form with 4 rows for Payer name input.

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099-R & W-2G' in the 2023 column.

Winnings not reported on W-2G...
Total gambling losses...

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history)
Form 1099-MISC - Miscellaneous income
Form 1099-K - Merchant card and third party network payments
Form 1099-S - Sales of real estate (also include closing statements)

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099' in the 2023 column.

- Form 1099-G - State tax refunds

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099' in the 2023 column.

Taxpayer:

- Form SSA-1099 - Social security benefits
Form 1099-G - Unemployment compensation
Form 1099-Q (529 Plan)
Form 1099-QA/5498-QA (ABLE Accounts)

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099' in the 2023 column.

Spouse:

- Form SSA-1099 - Social security benefits
Form 1099-G - Unemployment compensation
Form 1099-Q (529 Plan)
Form 1099-QA/5498-QA (ABLE Accounts)

Table with 2 columns: 2023 Amount, 2022 Amount. Contains 'Attach Forms 1099' in the 2023 column.

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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

Attach Forms 1098	

AFFORDABLE CARE ACT

Form 1095-A - Health Insurance Marketplace Statement

Attach Forms 1095	

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

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