

# Anita C. Simperts EA

# 2023 Tax Organizer

This tax organizer is provided to assist you in gathering your tax documents. Use your 2022 tax return as a starting point.

Please furnish us with any notices, penalties or correspondence from the IRS or from State or Local tax authorities.  
Also, please furnish us with details of any unusual transactions of income or expense.

## Personal Information

Name: \_\_\_\_\_

Did your marital status change during the year? Yes No If yes, please explain \_\_\_\_\_

Did your contact information change from last year? If yes, please provide updates below.

Address: \_\_\_\_\_

Phone number(s): \_\_\_\_\_

Email address(s): \_\_\_\_\_

County & School District: \_\_\_\_\_

## Bank Information – If you have an overpayment for 2023, would you like to have the amount –

Applied to 2024 estimates? Yes No OR directly deposited into your bank account? Yes No

If you owe tax for 2023, would you like your payment electronically withdrawn from your bank account? Yes No

If you need to make 2024 estimates, would you like those to be electronically withdrawn? Yes No

**If requesting DD or electronic W/D, please provide your bank account information to use for DD or W/D:**

\_\_\_\_\_ CK or SV  
Bank Name Routing Number Account Number

## Delivery of tax return – Would you be interested in having your tax return provided to you electronically and signing the authorization form electronically? If so, provide an email and cell phone number for you and your spouse (if applicable).

Taxpayer email \_\_\_\_\_ cell number \_\_\_\_\_

Spouse email \_\_\_\_\_ cell number \_\_\_\_\_

## Estimated Tax Payments paid for 2023 income taxes (please complete if you paid estimated tax payments)

### Federal Estimated Tax Payments

Due Date	Date Paid	Amount
4/18/23	___/___/___	\$ _____
6/15/23	___/___/___	\$ _____
9/15/23	___/___/___	\$ _____
1/15/24	___/___/___	\$ _____

### State Estimated Tax Payments - \_\_\_\_\_ (state)

Date Paid	Amount
___/___/___	\$ _____
___/___/___	\$ _____
___/___/___	\$ _____
___/___/___	\$ _____

## Miscellaneous Information

- Were you a K-12 educator who worked at least 900 hours? If yes, your educator expenses \$ \_\_\_\_\_
- Were you a volunteer firefighter, EMT or reserve peace officer? If yes, **please provide certificate to verify eligibility** for state tax credit. Also volunteer miles \_\_\_\_\_. Other \_\_\_\_\_
- Did you have a financial interest or signature authority over a financial account located in a foreign country? Yes No
- Do you have any foreign financial accounts, assets or own a foreign entity? Yes No
- Did you receive, sell, gift, exchange, or otherwise acquire financial interest in any DIGITAL ASSET (Bitcoin)? Yes No

## Health Care Information

- Did you receive in Marketplace (aka Obamacare) health insurance? **1095-A necessary to file tax return**
- Did you receive distributions from a HAS or Archer MSA? **1099-SA**. Were all distributions used to pay medical expenses?

**Dependent Information** – were there any changes in dependents from the prior year?\* Yes No

**Dependent additions information:**

Full name	Social Security #	Birthdate	Relationship
_____	_____	_____	_____
_____	_____	_____	_____

If any dependent added above was adopted, please provide a list of qualified adoption expenses. DO NOT INCLUDE fees to adopt your Spouse's/Partner's child.

**Dependents you can no longer claim** (child got married or turned 19 & not a full-time student or reached the age 24:

Name \_\_\_\_\_

\*An eligible dependent generally includes your unmarried child who is under age 19 or who is a full time student under age 24, lived in the same principal place of abode for more than one-half of the year (away at school is still considered living in main abode), meets the relationship test of taxpayer's son, daughter, brother, sister, STEPs, or a descendant of such individuals, adopted children and certain foster children. Parents – do not have to live with you.

**Did you have any Qualifying relative** (*lineal ancestor or descendant, sibling, niece, nephew, aunt, uncle, in-law or housemate*) for whom you provided more than half of their support for the year and whose gross income was less than \$4,700? If so, you may be able to claim that person as a non-child dependent.

Full name	Social Security #	Birthdate	Relationship
_____	_____	_____	_____
_____	_____	_____	_____

**Child Care Credit** – did you pay for child care while you worked/looked for work/went to school? If yes, please provide a receipt from the person or organization who provided the care. Make sure the receipt includes: **Carer's Name, Address, Federal ID/Social Security number, Amount paid carer, Names of children in care and the amount paid for each.**

**Education Information**

- [ ] Did you have any education expenses during the year for yourself, your spouse, or a dependent? **1098T, & a BURSAR's Statement, list of payments (including loans) and expenses.**
- [ ] During the first four years- did you purchase textbooks? \$ \_\_\_\_\_
- [ ] Did you make any withdrawals from an education savings/529 plan? **1099Q**
- [ ] Did you pay any student loan interest this year? please provide **1098E**
- [ ] Did you cash any Series EE or I US Savings Bonds to pay for college? **1099INT and note used for education.**
- [ ] Did you make contributions to College Savings Plan or other 529 Plan? **Statement or letter from plan, \$ and State.**

**Energy Credits / Plug-in Vehicle Credits** – (bring receipts and details)

**Income Information** – Please provide any of the following that is applicable:

W-2 (wages, salaries)	1099-SSA (Social Security)
1099-INT and/or 1099-DIV (interest, dividends)	1099-R (Retirement withdrawals – 401K/403B/IRA/SEP/etc)
1099-B (stock or digital asset sales)	1099-R (IRA to ROTH Conversion) <b>additional detail needed</b>
K-1 Partnership or S-Corp	K-1 Estate or Trust
1099-G (unemployment)	W-2G (gambling)
1099-MISC or 1099-NEC (misc income)	1099-S (sale of real estate)

**Itemized Deduction Information** – detailed list on [www.simperstax.com](http://www.simperstax.com)

**Medical, Dental, Vision expenses** – do not include amounts reimbursed by HSA, insurance, pre-tax plans).

**Taxes** – property taxes, sales tax on major purchases.

**Interest you paid** –Mortgage interest and Home Equity loans (HELOC)-interest is only deductible if the loan funds were used to buy build or substantially improve your main or second home. Funds used for personal use (auto loan, pay off credit cards, etc) are not deductible. IF you refinance we need the HUD statement and reason for additional funds.

**Gifts to Charity**- Single contributions of \$250+ require a written receipt received before return is filed. Non-cash contributions totaling \$500- please provide receipts and general details of donations.