

# 2023 TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name .....	_____	Last name.....	_____
First name .....	_____	First name .....	_____
Middle Initial.....	_____	Middle Initial .....	_____
Suffix.....	_____	Suffix.....	_____
Social security number .....	_____	Social security number .....	_____
Occupation .....	_____	Occupation.....	_____
Work phone .....	_____	Work phone.....	_____
Ext ...	_____	Ext ...	_____
Cell phone .....	_____	Cell phone .....	_____
E-mail address.....	_____	E-mail address.....	_____
Date of birth.....	_____	Date of birth .....	_____
Address .....	_____		Apartment number.....
City .....	_____	State.....	_____
ZIP Code.....	_____		
Home phone.....	_____	Fax number .....	_____

Dependent Information					
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

Education Tuition and Fees	
Attach all Form 1098-Ts and a list of your qualified education expenses.	
Student Loan Interest Paid	
Enter total 2023 qualified student loan interest.....	

**Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**

Employer Name

2022 Amount

**Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**

1099-R Payer Name

2022 Amount

**Attach Form(s) SSA-1099 – Social Security/Railroad Benefits**

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099 .....

Railroad Retirement Benefits from Form RRB-1099 .....

Medicare B premiums withheld .....

Medicare C premiums withheld .....

Medicare D premiums withheld .....

**Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC**

1099-MISC Payer Name and 1099-NEC Payer Name

**Attach Form(s) 1099-INT – Interest Income**

1099-INT Payer Name

2022 Amount

**Attach Form(s) 1099-DIV – Dividend Income**

1099-DIV Payer Name

2022 Amount

**Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc**

Attach all stock sale transaction information, including initial cost information.

**Other Government Forms to attach:**

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

**Other Income:**

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

**Retirement Plan Contributions**

Taxpayer

Spouse

Traditional IRA contributions made for 2023 .....

Roth IRA contributions made for 2023 .....

SEP, Keogh, Individual 401(k) or SIMPLE Contributions .....

## 2023 Deductions

Medical and Dental Expenses	2023 Amount	2022 Amount
Prescription medications.....	_____	_____
Health insurance premiums .....	_____	_____
Doctors, dentists, etc.....	_____	_____
Hospitals, clinics, etc.....	_____	_____
Eyeglasses and contact lenses .....	_____	_____
Miles driven for medical purposes.....	_____	_____
Other medical and dental expenses: _____	_____	_____

  

Taxes	2023 Amount	2022 Amount
Real estate taxes paid on principal residence .....	_____	_____
Real estate taxes paid on additional homes or land .....	_____	_____
Auto license registration fees based on the value of the vehicle .....	_____	_____
Other personal property taxes .....	_____	_____

  

Interest Expenses		
Home mortgage interest paid — Attach Form(s) 1098.		
Lender's Name	2023 Amount	2022 Amount
_____	_____	_____
Points paid on loan to buy, build or improve main home		
Lender's Name	2023 Amount	
_____	_____	

  

Cash/Check/Credit Contributions	2023 Amount	2022 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

  

Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		

  

Miscellaneous Deductions	2023 Amount	2022 Amount
Union and professional dues.....	_____	_____
Professional subscriptions, books, supplies.....	_____	_____
Uniforms and protective clothing (including cleaning) .....	_____	_____
Job search costs .....	_____	_____
Taxpayer educator expenses.....	_____	_____
Spouse educator expenses.....	_____	_____
Tax return preparation fees .....	_____	_____
Safe deposit box rental .....	_____	_____
Gambling losses (to the extent of gambling income) .....	_____	_____
Other expenses (list): _____	_____	_____

	Yes	No
1 Did a lender cancel any of your debt in 2023? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023? If yes, please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2023? If yes, enter year, make, model, and date purchased: .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2023? If yes, attach Form 1098C.....	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2023? ..... % State ID .....		
7 Did your marital status change during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: .....		
8 Were you or your spouse permanently and totally disabled in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500?...	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income not reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
16a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, attach closing or escrow statements, 1099-C or 1099-A forms.....	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?.....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any casualty or theft losses during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts? .....	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you buy or sell any stocks or bonds in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you incur any moving expenses? If yes, attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach information.		
24 Do you expect your income and deductions in 2024 to be the same as 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
If no, attach explanation of changes expected.		
25 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
26 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? .....	<input type="checkbox"/>	<input type="checkbox"/>
27 a Did you obtain a Paycheck Protection Program (PPP) loan? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, has any portion of that loan been forgiven? .....	<input type="checkbox"/>	<input type="checkbox"/>
28 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
29 Enter your state of residence..... Taxpayer _____ Spouse _____		
30 a Do you want to change the language with which the IRS communicates with you? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language?.....		

	Yes	No
<b>Electronic Filing and Direct Deposit of Refund</b>		
If your tax return is eligible for Electronic Filing, would you like to file electronically?.....	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?..... Checking <input type="checkbox"/> Savings <input type="checkbox"/>		

Estimated Tax Paid			State			Local		
Federal								
Date	Amount		Date	Amount	ID	Date	Amount	ID

**Additional Information** (Enter any additional information here and attach any documents.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Business Income and Expenses

ORG19

## GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

1 Check ownership ☐ Taxpayer ☐ Spouse ☐ Joint

2 Business name .....

3 a Business street address.....

b 1 City, State and Zip Code, or .....

2 Foreign country.....

4 Principal business/profession .....

5 Employer ID number.....

6 Business code (Preparer Use Only) ..... Yes No

7 Was this business fully disposed of in a fully taxable transaction during 2023? ☐ Yes ☐ No

8 Accounting method:  
Cash ☐ Accrual ☐ Other (specify) ☐ .....

9 Method used to value closing inventory:  
Cost ☐ Lower of cost or market ☐ Other (explain) ☐ .....

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory? (If yes, attach explanation) ..... Yes No

11 Did you materially participate in the operation of this business during 2023? ..... Yes No

12 Did you start or acquire this business during 2023? ..... Yes No

13 a Did you make any payments in 2023 that require you to file Forms 1099? ..... Yes No

b If yes, did you or will you file all the required Forms 1099? ..... Yes No

14 At-risk determination:  
a Is all of the investment in this activity at risk? ..... Yes No

b Is some of the investment in this activity not at risk? ..... Yes No

15 Did you have unallowed passive losses in 2022? ..... Yes No

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... Yes No

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular ☐ Extension ☐ No ☐

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... Yes No

d Was this business located in a Qualified Disaster Area? ..... Yes No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME		2023	2022
17	Gross receipts or sales.....		
18	Returns and allowances plus other adjustments.....		
19	Other income (include federal/state gas tax credit/refund) .....		
COST OF GOODS SOLD – IF APPLICABLE		2023	2022
20	Inventory at beginning of year .....		
21	Purchases .....		
22	Items withdrawn for personal use .....		
23	Cost of labor (do not include your salary) .....		
24	Materials and supplies .....		
25	Other costs .....		
26	Inventory at end of year.....		

# Business Income and Expenses (continued)

ORG19

EXPENSES	2023	2022
Business name _____		
27 Advertising .....		
28 Car and truck expenses (complete ORG18).....		
29 Commissions and fees.....		
30 Contract labor .....		
31 Depletion .....		
32 Depreciation and Section 179 deduction (Preparer Use Only).....		
33 Employee benefit programs:		
a Employee health insurance premiums .....		
b Other employee benefit programs .....		
34 Insurance (other than health) .....		
35 Self-employed health insurance attributable to this business.....		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098.....		
b Other .....		
37 Legal and professional services .....		
38 Office expenses .....		
39 Pension and profit-sharing plans .....		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18) .....		
b Other business property.....		
41 Repairs and maintenance .....		
42 Supplies (not included in cost of goods sold) .....		
43 Taxes and licenses not reported to you on Form 1098.....		
44 Travel and meals		
a Travel.....		
b Meals subject to 50% limit.....		
c Meals subject to 80% limit.....		
d Meals not subject to limit .....		
45 Utilities .....		
46 Gross wages .....		
47 Other expenses:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
48 Expenses for business use of your home (Preparer Use Only).....		
Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs .....		
50 DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018.....		
51 DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017 .....		

# Rent and Royalty Income and Expenses

ORG25

## BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: \_\_\_\_\_

Is this activity a qualified trade or business under Section 199A? ..... ☐ Yes ☐ No

- 1 Check property owner ..... ☐ Taxpayer ☐ Spouse ☐ Joint Yes No
- 2 a Did you make any payments that would require you to file Form(s) 1099? ..... ☐ Yes ☐ No
- b If yes, did you or will you file all required Forms(s) 1099? ..... ☐ Yes ☐ No
- 3 a Enter the ownership percentage (if not 100%) ..... \_\_\_\_\_
- b If not 100%, are you reporting 100% of the income and expenses? ..... ☐ Yes ☐ No
- 4 Is this a rental property? (If yes, answer questions 5 through 11; if no, skip to question 12.) ..... ☐ Yes ☐ No
- 5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? ..... ☐ Yes ☐ No
- 6 For all rental properties, enter the number of days during 2023 that:
- a The property was rented at fair rental value ..... \_\_\_\_\_
- b The property was used personally or rented at less than fair rental value ..... \_\_\_\_\_
- c You owned the property, if not the entire year ..... \_\_\_\_\_
- 7 a Does this rental have multiple living units and you live in one of the units? ..... ☐ Yes ☐ No
- b If yes, enter percentage of rental use ..... \_\_\_\_\_
- 8 Did you actively participate in this property's management during 2023 ? ..... ☐ Yes ☐ No
- 9 Did you materially participate in this property's management during 2023 ? ..... ☐ Yes ☐ No
- 10 Do you want to treat this property as non-passive? ..... ☐ Yes ☐ No
- 11 Did this property have unallowed passive losses in 2022 ? ..... ☐ Yes ☐ No
- 12 Did you dispose of this property in a fully taxable transaction? ..... ☐ Yes ☐ No
- 13 Check this box if some of this investment was not at-risk ..... ☐ Yes ☐ No
- 14 a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... ☐ Yes ☐ No
- b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... Regular ☐ Extension ☐ No ☐ Yes
- c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... ☐ Yes ☐ No
- d Was this activity located in a Qualified Disaster Area? ..... ☐ Yes ☐ No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME		2023	2022
15 Rents or royalties received .....			
* Property Types: <div>                         1 Single family residence                         2 Multi-family residence                         3 Vacation/short-term rental                         4 Commercial                     </div>		<div>                         5 Land                         6 Royalties                         7 Self-rental                         8 Other                     </div>	

# Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2023	2022
Property location .....		
16 Advertising .....		
17a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance .....		
19 Commissions.....		
20a Mortgage insurance premiums — qualified .....		
b Other insurance .....		
21 Legal and professional fees .....		
22 Management fees .....		
23a Mortgage interest paid to banks — qualified.....		
b Mortgage interest paid to banks — other .....		
24 Other interest .....		
25 Repairs.....		
26 Supplies.....		
27a Real estate taxes.....		
b Other taxes.....		
28 Utilities .....		
29 Other expenses:		
a .....		
b .....		
c .....		
d .....		
e .....		
30a Depreciation and Section 179 deduction (Preparer Use Only) .....		
b Depletion (Preparer Use Only).....		



**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-		Vehicle 1	Vehicle 2	Vehicle 3
1	Description of vehicle.....			
2 a	Date placed in service.....			
b	Date acquired, if different from line 2a.....			
3	Enter detail on lines 3a and 3b, or total on line 3c:			
a	Ending mileage reading.....			
b	Beginning mileage reading.....			
c	Total miles for the year (line 3a less line 3b).....			
4	Business miles 01/01/2023 thru 12/31/2023.....			
5	Total commuting miles.....			
STANDARD MILEAGE RATE		Vehicle 1	Vehicle 2	Vehicle 3
6	Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7	Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES		Vehicle 1	Vehicle 2	Vehicle 3
8	Gasoline, oil, repairs, insurance, etc.....			
9	Vehicle registration fee (excluding property tax).....			
10	Vehicle lease or rental fee.....			
11	Inclusion amount (Preparer Use Only).....			
12	Depreciation (Preparer Use Only).....			
13	Parking fees, tolls, and local transportation.....			
14	Portion of vehicle registration fee based on value.....			
15	Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS		Vehicle 1	Vehicle 2	Vehicle 3
16	Cost or basis.....			
17	Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18	Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19	Type of vehicle (Preparer Use).....			
20	Section 179 expense (Preparer Use).....			
21	Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22	Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23	Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24	Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25	Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26	Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27	Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28	Date sold.....			
29	Sales price.....			
30	Expense of sale.....			
31	Gain/loss basis, if different (Preparer Use).....			
32	AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS		Vehicle 1	Vehicle 2	Vehicle 3
33	Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34	Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35	Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36	Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37	If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No