

2023 Tax Worksheet - Please fill out and bring to your appointment!

Taxpayer/Spouse Name _____ **Birthdate** _____ **Social Security # (please verify)** _____ **Occupation** _____

NEW ADDRESS (if any) _____
PHONE NUMBERS Home _____ Work _____ Cell _____ Fax _____
Taxpayer Email: _____ **Spouse Email:** _____

DEPENDENTS (if new client, list all; otherwise, list changes from last tax year):

Name	Birthdate	Social Security # (please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

SOURCES OF INCOME:	Gross	Federal Tax	State Tax
W-2 _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total W-2	\$ _____	_____	_____
1099-R _____	_____	_____	_____
Soc. Security _____	_____	_____	_____
1099-MISC _____	_____	_____	_____
_____	_____	_____	_____
Unemployment _____	_____	_____	_____
State Tax Refund _____	_____	_____	_____
Alimony Received (if divorce final before 2019) _____	_____	_____	_____
Gambling Winnings (1099-G) _____	_____	_____	_____
Other _____	_____	_____	_____
Total Tax Withheld	_____	\$ _____	\$ _____

2023 ESTIMATED TAX PAYMENTS:

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____
Total Amount: \$	_____			

INTEREST INCOME:

_____	\$ _____
_____	\$ _____
_____	\$ _____

DIVIDEND INCOME:

_____	\$ _____
_____	\$ _____
_____	\$ _____

SPECIAL ADJUSTMENTS:

HSA Contributions (not on W-2)	\$ _____
HSA Distributions (Form 1099-SA)	\$ _____
IRA Deposits (not on W-2)	\$ _____
Roth Deposits (not on W-2)	\$ _____
Keogh/SEP Deposits(not on W-2)	\$ _____

Alimony Paid (if divorce before 2019) \$ _____
 Name: _____ SSN: _____
 Educator Out-of-Pocket Expenses \$ _____
 Early Withdrawal Penalties \$ _____

EDUCATION DEDUCTIONS/CREDITS:

Student Loan Interest	\$ _____
Tuition (by individual, per form 1098T)	\$ _____
Undergraduate Studies	\$ _____
Graduate Studies	\$ _____
Required Books & Supplies	\$ _____
Other	\$ _____

Taxpayer Name: _____	2023
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ID Verification (for preparer use)

DIGITAL MAIL PICK UP
(Must request paper copy-\$15 add'l charge applies)