

## Client Organizer Topical Index

**This client organizer topical index is designed to help you quickly locate the items listed. To use the index just locate the topic and refer to the page number listed. The page number corresponds to the number printed in the top right corner of your organizer sheets. Please note this organizer is customized specifically for you, and may not contain all of the pages listed here.**

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**Please note the following conventions used throughout your client organizer: T/S/J and T/S headings should be used to indicate if an item belongs to the (T)axpayer, (S)pouse, or (J)oint. Also, if an item did not occur in your resident state, please indicate the state's postal code abbreviation in which the item occurred. Control totals and [ ] numbers are for preparer use only.**

**Personal Information**

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying surviving spouse) \_\_\_\_\_[1]  
 Mark if you were married but living apart all year \_\_\_\_\_[2]  
 Mark if your nonresident alien spouse does not have an Individual Taxpayer Identification Number (ITIN) \_\_\_\_\_[3]

	<b>Taxpayer</b>		<b>Spouse</b>
Social security number	_____ [4]		_____ [5]
First name	_____ [6]		_____ [7]
Last name	_____ [8]		_____ [9]
Occupation	_____ [10]		_____ [11]
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	_____ [12]		_____ [14]
Mark if dependent of another taxpayer	_____ [15]		_____ [16]
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	_____ [17]		
Mark if legally blind	_____ [20]		_____ [21]
Date of birth	_____ [22]		_____ [24]
Date of death	_____ [26]		_____ [27]
Work/daytime telephone number/ext number	_____ [28] _____ [29]		_____ [30] _____ [31]
Home/evening telephone number	_____ [32]		_____ [33]
Do you authorize us to discuss your return with the IRS? (Y, N)	_____ [34]		

**Present Mailing Address**

Address \_\_\_\_\_ [40]  
 Apartment number \_\_\_\_\_ [41]  
 City, state postal code, zip code \_\_\_\_\_ [42] \_\_\_\_\_ [43] \_\_\_\_\_ [44]  
 Foreign country name \_\_\_\_\_ [46]  
 Foreign phone number \_\_\_\_\_ [49]  
 In care of addressee \_\_\_\_\_ [51]

**Dependent Information**

(\*Please refer to Dependent Codes located at the bottom)

First Name <sup>52]</sup>	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	**Dep Codes * **	Care expenses paid for dependent

Name of child who lived with you but is not your dependent \_\_\_\_\_ [53]  
 Social security number of qualifying person \_\_\_\_\_ [54]

**Dependent Codes**

- |   |   |
|---|---|
| <p><b>*Basic</b></p> <ul style="list-style-type: none"> <li>1 = Child who lived with you</li> <li>2 = Child who did not live with you due to divorce/separation</li> <li>3 = Other dependent</li> <li>4 = Other dependents, but do not qualify for Credit for Other Dependents (ODC)</li> <li>5 = Qualifying child for Earned Income Credit only</li> <li>6 = Children who lived with you, but do not qualify for Earned Income Credit</li> <li>7 = Children who lived with you, but do not qualify for Child Tax Credit</li> <li>8 = Children who lived with you, but do not qualify for Child Tax Credit/Credit for Other Dependents/Earned Income Credit</li> </ul> <p><b>***Months</b></p> <ul style="list-style-type: none"> <li>77 = Reported on odd year return</li> <li>88 = Reported on even year return</li> <li>99 = Not reported on return</li> </ul> | <p><b>**Other</b></p> <ul style="list-style-type: none"> <li>1 = Student (Age 19 - 23)</li> <li>2 = Disabled dependent</li> <li>3 = Dependent who is both a student and disabled</li> </ul> |
|---|---|

**Preparer - Enter on Screen Contact**

Tax matters person (Indicate which spouse handles tax return related questions) (Blank = Both, T = Taxpayer, S = Spouse) \_\_\_\_\_ [8]

Taxpayer email address \_\_\_\_\_ [9]

Spouse email address \_\_\_\_\_ [10]

**Taxpayer**

**Spouse**

Fax telephone number \_\_\_\_\_ [11] \_\_\_\_\_ [20]

Mobile telephone number \_\_\_\_\_ [12] \_\_\_\_\_ [21]

Mobile telephone #2 number \_\_\_\_\_ [13] \_\_\_\_\_ [22]

Pager number \_\_\_\_\_ [14] \_\_\_\_\_ [23]

Other: \_\_\_\_\_ [15] \_\_\_\_\_ [24]

    Telephone number \_\_\_\_\_ [16] \_\_\_\_\_ [25]

    Extension \_\_\_\_\_ [17] \_\_\_\_\_ [26]

Preferred method of contact: \_\_\_\_\_ [18] \_\_\_\_\_ [27]  
    Email, Work phone, Home phone, Fax, Mobile phone, Mobile phone #2

**NOTES/QUESTIONS:**

**Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.**

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct.  [1]

Primary account:

Financial institution routing transit number \_\_\_\_\_ [3]

Name of financial institution \_\_\_\_\_ [4]

Your account number \_\_\_\_\_ [5]

Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_ [6]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_ [9]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [10]

Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ [11] or Percent (xxx.xx) \_\_\_\_\_ [12]

Secondary account #1:

Financial institution routing transit number \_\_\_\_\_ [27]

Name of financial institution \_\_\_\_\_ [28]

Your account number \_\_\_\_\_ [29]

Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_ [30]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_ [31]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [32]

Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ [13] or Percent (xxx.xx) \_\_\_\_\_ [14]

Secondary account #2:

Financial institution routing transit number \_\_\_\_\_ [33]

Name of financial institution \_\_\_\_\_ [34]

Your account number \_\_\_\_\_ [35]

Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_ [36]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_ [37]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_ [38]

Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ [17] or Percent (xxx.xx) \_\_\_\_\_ [18]

\*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

### Refund - U.S. Series I Savings Bond Purchases

**A tax refund may be used to buy up to \$5,000 of U.S. Series I Savings bonds and registered for up to three different persons. If you would like to purchase U.S. Series I Savings bonds (in increments of \$50) with your refund, if applicable, please complete the following information. Please note you may enter only one name per registration (with exception of married filing joint returns) and must enter the party's given name, do not use nicknames.**

Indicate either a maximum dollar amount (up to \$5,000), or percentage of refund you would like used to purchase bonds

The bonds will be registered to the name(s) on the return. For married filing joint returns this means the bonds will be registered in both names listed on the return.

To register the bonds separately, leave these fields blank and use the fields provided below.

Enter either a dollar amount or percent, but not both Dollar \_\_\_\_\_ [15] or Percent (xxx.xx) \_\_\_\_\_ [16]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to \$5,000), or percentage of refund used to purchase bonds \_\_\_\_\_ [19] or Percent (xxx.xx) \_\_\_\_\_ [20]

Owner's name (First Last) \_\_\_\_\_ [40] \_\_\_\_\_ [41]

Co-owner or beneficiary (First Last) \_\_\_\_\_ [42] \_\_\_\_\_ [43]

Mark if the name listed above is a beneficiary \_\_\_\_\_ [44]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to \$5,000), or percentage of refund used to purchase bonds \_\_\_\_\_ [23] or Percent (xxx.xx) \_\_\_\_\_ [24]

Owner's name (First Last) \_\_\_\_\_ [45] \_\_\_\_\_ [46]

Co-owner or beneficiary (First Last) \_\_\_\_\_ [47] \_\_\_\_\_ [48]

Mark if the name listed above is a beneficiary \_\_\_\_\_ [49]

Please provide copies of all Forms 1042-S, SSA-1042S, 8288A, and 8805

Country where you are a citizen or national during the tax year \_\_\_\_\_ [2]  
 Foreign address to use for refund check, if different than mailing address entered on Screen 1040:  
 Foreign address \_\_\_\_\_ [3]  
 Foreign city \_\_\_\_\_ [4]  
 Foreign country name \_\_\_\_\_ [6]  
 Foreign province or county \_\_\_\_\_ [7]  
 Foreign postal code \_\_\_\_\_ [8]  
 Country of permanent residence for tax purposes \_\_\_\_\_ [10]  
 Scholarships and fellowship grants received during tax year: \_\_\_\_\_ [15]  
 U.S. real property interests that were disposed at a gain during the tax year \_\_\_\_\_ [18]

**Income Not Effectively Connected with a U.S. Trade or Business**

Payer / Description	Tax Rate	Income	U.S. Fed Withholding
Dividends paid by U.S. corporations:		[21]	
Dividends paid by foreign corporations:		[23]	
Interest received on mortgages:		[27]	
Interest paid by foreign corporations:		[29]	
Other Interest received:		[31]	
Industrial royalties (patents, trademarks, etc.)		[33]	
Motion picture or T.V. copyright royalties		[35]	
Other royalties (copyrights, recording, publishing, etc.)		[37]	
Real property income and natural resources royalties		[39]	
Pensions and annuities:		[41]	
Gambling - Residents of Canada only:			
Winnings [42]      Losses [44]			[43]
Gambling - Residents of countries other than Canada:		[47]	
Other income:		[49]	

**Capital Gains & Losses Not Effectively Connected with a U.S. Trade or Business**

Description of Property [42]	Date Acquired	Date Sold	Sales Price	Cost/Basis	U.S. Fed W/H
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**Control Totals**

Have you ever applied to be a green card holder of the United States (Y, N) \_\_\_\_\_ [1]

Were you ever a U.S. citizen? (Y, N) \_\_\_\_\_ [2]

Were you ever a green card holder of the U.S.? (Y, N) \_\_\_\_\_ [3]

If you had a visa on December 31, 2023, enter your visa type \_\_\_\_\_ [5]

If you did not have a visa, enter your U.S. immigration status on December 31, 2023 \_\_\_\_\_ [6]

Date you first entered U.S. \_\_\_\_\_ [7]

If you've ever changed your visa types (nonimmigrant status) or U.S. immigration status:

    Date of visa change \_\_\_\_\_ [9]

    Nature of your visa change \_\_\_\_\_ [10]

If you are a resident of Canada or Mexico **AND** commute to work in the U.S. at frequent intervals, enter 1 for Canada or 2 for Mexico \_\_\_\_\_ [11]

List all dates you entered and left the United States during 2023 (NA for residents of Canada or Mexico):

Date Entered	Date Left	Date Entered	Date Left	Date Entered	Date Left	Date Entered	Date Left
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

Enter the total number of days (including vacation, nonworkdays, partial work days) you were present in the U.S. during:

2021 \_\_\_\_\_ [13]

2022 \_\_\_\_\_ [14]

2023 \_\_\_\_\_ [15]

Latest U.S. income tax return you filed prior to 2023:

Year filed \_\_\_\_\_ [16]

Type of return filed \_\_\_\_\_ [17]

Did you receive total compensation of \$250,000 or more during 2023 (Y, N) \_\_\_\_\_ [18]

If "Yes" did you use an alternative method to determine the source of the compensation? (Y, N) \_\_\_\_\_ [20]

If you used an alternative method to determine the source of the compensation, provide details in the space below.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Complete the following if claiming exemption from income tax under a U.S. income tax treaty

Country Name [21]	Tax Treaty Article	Months Claimed in 2022	Exempt Income in 2023
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Were you subject to tax in a foreign country on any of the income entered in the "Exempt income 2023" column (Y, N) \_\_\_\_\_ [22]

Are you claiming treaty benefits pursuant to a Competent Authority determination. If yes, attach a copy of the determination (Y, N) \_\_\_\_\_ [23]

If you paid any amounts related to your 2023 nonresident return (i.e. estimates, extension, Form 1040-C), enter the Internal Revenue Service office that received the payments \_\_\_\_\_ [26]

**IRS regulations require paid tax preparers who expect to prepare a certain amount of federal individual tax returns to file them electronically. To comply with this requirement your return will be electronically filed this year if it qualifies for electronic filing under IRS rules. Taxpayers may choose to file a paper return instead of filing electronically.**

Mark if you want to file a paper return even if you qualify for electronic filing \_\_\_\_\_[1]

Receive email notification(s) when your electronic file is accepted by the taxing agency (Blank = None, 1 = Return, 2 = Return & Extension) \_\_\_\_\_[2]

If 1 or 2, please provide email address on Organizer Form ID: Info

Mark if you are filing a balance due return electronically and you want to pay the amount due by debiting your financial institution account \_\_\_\_\_[9]

The IRS requires a Personal Identification Number (PIN) be used in signing returns that are electronically filed.

Each taxpayer and spouse, if applicable, must provide a 5 digit self-selected PIN of your choice other than all zeroes.

Taxpayer self-selected Personal Identification Number (PIN) \_\_\_\_\_[7]

Spouse self-selected Personal Identification Number (PIN) \_\_\_\_\_[8]

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## NOTES/QUESTIONS:

**Taxpayer -**

Form of identification ( 1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) \_\_\_\_\_ [1]  
Identification number \_\_\_\_\_ [3]  
Issue date \_\_\_\_\_ [4]  
Expiration date (mm/dd/yyyy) \_\_\_\_\_ [5]  
Location of issuance (State issued only) \_\_\_\_\_ [6]  
Document number (New York only) \_\_\_\_\_ [7]

**Spouse -**

Form of identification ( 1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) \_\_\_\_\_ [10]  
Identification number \_\_\_\_\_ [12]  
Issue date \_\_\_\_\_ [13]  
Expiration date (mm/dd/yyyy) \_\_\_\_\_ [14]  
Location of issuance (State issued only) \_\_\_\_\_ [15]  
Document number (New York only) \_\_\_\_\_ [16]

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**NOTES/QUESTIONS:**



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

Refunded \_\_\_\_\_ [52]

Applied to 2024 estimated tax liability \_\_\_\_\_ [53]

Do you expect a considerable change in your 2024 income? (Y, N) \_\_\_\_\_ [54]

If yes, please explain any differences: \_\_\_\_\_ [55]

\_\_\_\_\_ [56]

\_\_\_\_\_ [57]

\_\_\_\_\_ [58]

Do you expect a considerable change in your deductions for 2024? (Y, N) \_\_\_\_\_ [59]

If yes, please explain any differences: \_\_\_\_\_ [60]

\_\_\_\_\_ [61]

\_\_\_\_\_ [62]

\_\_\_\_\_ [63]

Do you expect a considerable change in the amount of your 2024 withholding? (Y, N) \_\_\_\_\_ [64]

If yes, please explain any differences: \_\_\_\_\_ [65]

\_\_\_\_\_ [66]

\_\_\_\_\_ [67]

\_\_\_\_\_ [68]

Do you expect a change in the number of dependents claimed for 2024? (Y, N) \_\_\_\_\_ [69]

If yes, please explain any differences: \_\_\_\_\_ [70]

\_\_\_\_\_ [71]

\_\_\_\_\_ [72]

\_\_\_\_\_ [73]

Payment method used to pay your estimated taxes (1=Electronic Federal Tax Payment System (EFTPS); 2=Direct Pay) \_\_\_\_\_ [74]

**2023 Federal Estimated Tax Payments**

2022 overpayment applied to 2023 estimates \_\_\_\_\_ [1]

Mark if you paid the calculated amounts on the dates due indicated below. Skip the remaining fields. \_\_\_\_\_ [5]

If your estimated payments were not made on the date due or were for an amount other than the calculated amount below, please enter the actual date and amount paid.

	Date Due	Date Paid if After Date Due	Amount Paid	Calculated Amount	Method*
1st quarter payment	04/18/23	_____ [6]	_____ [7]	_____	_____
2nd quarter payment	06/15/23	_____ [8]	_____ [9]	_____	_____
3rd quarter payment	09/15/23	_____ [10]	_____ [11]	_____	_____
4th quarter payment	01/16/24	_____ [12]	_____ [13]	_____	_____
Additional payment		_____ [14]	_____ [15]		

**\*Method of payment indicated in prior year**  
**EFW = Electronic funds withdrawal      EFTPS = Electronic Federal Tax Payment System**  
**Voucher = Form 1040-ES estimated tax payment voucher**

**NOTES/QUESTIONS:**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
**State postal code** \_\_\_\_\_ [2]

Amount paid with 2022 return \_\_\_\_\_ [3]  
 2022 overpayment applied to '23 estimates \_\_\_\_\_ [4]  
 Treat calculated amounts as paid \_\_\_\_\_ [8]

	<b>Date Paid</b>	<b>Amount Paid</b>	<b>Calculated Amount</b>
1st quarter payment	_____ [9]	_____ [10]	
2nd quarter payment	_____ [11]	_____ [12]	
3rd quarter payment	_____ [13]	_____ [14]	
4th quarter payment	_____ [15]	_____ [16]	
Additional payment	_____ [17]	_____ [18]	

**2023 City Estimated Tax Payments**

<p><b>City #1</b></p> <p>City name _____ [28]                  Amount paid with 2022 return _____ [31]                  2022 overpayment applied to '23 estimates _____ [32]                  Treat calculated amounts as paid _____ [36]</p>	<p><b>City #2</b></p> <p>City name _____ [50]                  Amount paid with 2022 return _____ [53]                  2022 overpayment applied to '23 estimates _____ [54]                  Treat calculated amounts as paid _____ [58]</p>
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<table border="1" style="width: 100%;"> <thead> <tr> <th><b>Date Paid</b></th> <th><b>Amount Paid</b></th> </tr> </thead> <tbody> <tr><td>1st quarter payment</td><td>_____ [37] _____ [38]</td></tr> <tr><td>2nd quarter payment</td><td>_____ [39] _____ [40]</td></tr> <tr><td>3rd quarter payment</td><td>_____ [41] _____ [42]</td></tr> <tr><td>4th quarter payment</td><td>_____ [43] _____ [44]</td></tr> </tbody> </table>	<b>Date Paid</b>	<b>Amount Paid</b>	1st quarter payment	_____ [37] _____ [38]	2nd quarter payment	_____ [39] _____ [40]	3rd quarter payment	_____ [41] _____ [42]	4th quarter payment	_____ [43] _____ [44]	<table border="1" style="width: 100%;"> <thead> <tr> <th><b>Date Paid</b></th> <th><b>Amount Paid</b></th> </tr> </thead> <tbody> <tr><td>1st quarter payment</td><td>_____ [59] _____ [60]</td></tr> <tr><td>2nd quarter payment</td><td>_____ [61] _____ [62]</td></tr> <tr><td>3rd quarter payment</td><td>_____ [63] _____ [64]</td></tr> <tr><td>4th quarter payment</td><td>_____ [65] _____ [66]</td></tr> </tbody> </table>	<b>Date Paid</b>	<b>Amount Paid</b>	1st quarter payment	_____ [59] _____ [60]	2nd quarter payment	_____ [61] _____ [62]	3rd quarter payment	_____ [63] _____ [64]	4th quarter payment	_____ [65] _____ [66]
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4th quarter payment	_____ [43] _____ [44]																				
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1st quarter payment	_____ [59] _____ [60]																				
2nd quarter payment	_____ [61] _____ [62]																				
3rd quarter payment	_____ [63] _____ [64]																				
4th quarter payment	_____ [65] _____ [66]																				

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

<p><b>City #3</b></p> <p>City name _____ [72]                  Amount paid with 2022 return _____ [75]                  2022 overpayment applied to '23 estimates _____ [76]                  Treat calculated amounts as paid _____ [80]</p>	<p><b>City #4</b></p> <p>City name _____ [94]                  Amount paid with 2022 return _____ [97]                  2022 overpayment applied to '23 estimates _____ [98]                  Treat calculated amounts as paid _____ [102]</p>
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<table border="1" style="width: 100%;"> <thead> <tr> <th><b>Date Paid</b></th> <th><b>Amount Paid</b></th> </tr> </thead> <tbody> <tr><td>1st quarter payment</td><td>_____ [81] _____ [82]</td></tr> <tr><td>2nd quarter payment</td><td>_____ [83] _____ [84]</td></tr> <tr><td>3rd quarter payment</td><td>_____ [85] _____ [86]</td></tr> <tr><td>4th quarter payment</td><td>_____ [87] _____ [88]</td></tr> </tbody> </table>	<b>Date Paid</b>	<b>Amount Paid</b>	1st quarter payment	_____ [81] _____ [82]	2nd quarter payment	_____ [83] _____ [84]	3rd quarter payment	_____ [85] _____ [86]	4th quarter payment	_____ [87] _____ [88]	<table border="1" style="width: 100%;"> <thead> <tr> <th><b>Date Paid</b></th> <th><b>Amount Paid</b></th> </tr> </thead> <tbody> <tr><td>1st quarter payment</td><td>_____ [103] _____ [104]</td></tr> <tr><td>2nd quarter payment</td><td>_____ [105] _____ [106]</td></tr> <tr><td>3rd quarter payment</td><td>_____ [107] _____ [108]</td></tr> <tr><td>4th quarter payment</td><td>_____ [109] _____ [110]</td></tr> </tbody> </table>	<b>Date Paid</b>	<b>Amount Paid</b>	1st quarter payment	_____ [103] _____ [104]	2nd quarter payment	_____ [105] _____ [106]	3rd quarter payment	_____ [107] _____ [108]	4th quarter payment	_____ [109] _____ [110]
<b>Date Paid</b>	<b>Amount Paid</b>																				
1st quarter payment	_____ [81] _____ [82]																				
2nd quarter payment	_____ [83] _____ [84]																				
3rd quarter payment	_____ [85] _____ [86]																				
4th quarter payment	_____ [87] _____ [88]																				
<b>Date Paid</b>	<b>Amount Paid</b>																				
1st quarter payment	_____ [103] _____ [104]																				
2nd quarter payment	_____ [105] _____ [106]																				
3rd quarter payment	_____ [107] _____ [108]																				
4th quarter payment	_____ [109] _____ [110]																				

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____

**Calculated Amount**

1st quarter payment	_____
2nd quarter payment	_____
3rd quarter payment	_____
4th quarter payment	_____



# Interest and Dividend Summary

Below is a list of the forms as reported in last year's tax return. Please provide copies of all 1099-INT and 1099-DIV you received. To indicate which forms are attached, enter a "1" for attached in the field provided. To indicate which forms are not applicable, enter a "2" for not applicable (N/A) in the field provided. Otherwise, leave this field blank.

Form	T/S/J	Description	Mark if 1 = Attached Foreign	2 = N/A

### Wages and Salaries #1

Please provide all copies of Form W-2.

2023 Information

Prior Year Information

Taxpayer/Spouse (T, S)	_____	[1]	
Employer name	_____	[3]	
Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 = National Guard, 5 = Diff of Care)			
Mark if this is your current employer	_____	[6]	
Mark if this is the last year for this employer	_____	[9]	
Federal wages and salaries (Box 1)	_____	[10]	_____
Federal tax withheld (Box 2)	_____	[12]	_____
Social security wages (Box 3) (if different than federal wages)	_____	[14]	_____
Social security tax withheld (Box 4)	_____	[16]	_____
Medicare wages (Box 5) (if different than federal wages)	_____	[18]	_____
Medicare tax withheld (Box 6)	_____	[21]	_____
SS tips (Box 7)	_____	[23]	_____
Allocated tips (Box 8)	_____	[25]	_____
Dependent care benefits (Box 10)	_____	[27]	_____
<b>Box 13 -</b>			
Statutory employee	_____	[29]	
Retirement plan	_____	[30]	
Third-party sick pay	_____	[31]	
State postal code (Box 15)	_____	[32]	
State wages (Box 16) (if different than federal wages)	_____	[34]	_____
State tax withheld (Box 17)	_____	[36]	_____
Local wages (Box 18)	_____	[38]	_____
Local tax withheld (Box 19)	_____	[40]	_____
Name of locality (Box 20)	_____	[43]	_____

Control Totals

### Wages and Salaries #2

Please provide all copies of Form W-2.

2023 Information

Prior Year Information

Taxpayer/Spouse (T, S)	_____	[1]	
Employer name	_____	[3]	
Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 = National Guard, 5 = Diff of Care)			
Mark if this your current employer	_____	[6]	
Mark if this is the last year for this employer	_____	[9]	
Federal wages and salaries (Box 1)	_____	[10]	_____
Federal tax withheld (Box 2)	_____	[12]	_____
Social security wages (Box 3) (if different than federal wages)	_____	[14]	_____
Social security tax withheld (Box 4)	_____	[16]	_____
Medicare wages (Box 5) (if different than federal wages)	_____	[18]	_____
Medicare tax withheld (Box 6)	_____	[21]	_____
SS tips (Box 7)	_____	[23]	_____
Allocated tips (Box 8)	_____	[25]	_____
Dependent care benefits (Box 10)	_____	[27]	_____
<b>Box 13 -</b>			
Statutory employee	_____	[29]	
Retirement plan	_____	[30]	
Third-party sick pay	_____	[31]	
State postal code (Box 15)	_____	[32]	
State wages (Box 16) (if different than federal wages)	_____	[34]	_____
State tax withheld (Box 17)	_____	[36]	_____
Local wages (Box 18)	_____	[38]	_____
Local tax withheld (Box 19)	_____	[40]	_____
Name of locality (Box 20)	_____	[43]	_____

Control Totals

## Interest Income

Please provide copies of all Form 1099-INT or other statements reporting interest income.

\*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.

T/S/J	Type Code <small>(**See codes below)</small>	Interest Income <sup>[1]</sup>	Tax Exempt Income	Penalty on Early Withdrawal	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Taxes Paid	Prior Year Information
	<b>1</b>	Payer						
		Amounts						
	<b>2</b>	Payer						
		Amounts						
	<b>3</b>	Payer						
		Amounts						
	<b>4</b>	Payer						
		Amounts						
	<b>5</b>	Payer						
		Amounts						
	<b>6</b>	Payer						
		Amounts						
	<b>7</b>	Payer						
		Amounts						
	<b>8</b>	Payer						
		Amounts						
	<b>9</b>	Payer						
		Amounts						
	<b>10</b>	Payer						
		Amounts						

**Interest Codes		
Blank = Regular Interest	4 = Accrued Interest	6 = ABP Adjustment
3 = Nominee Distribution	5 = OID Adjustment	7 = Series EE & I Bond

Control Totals

## Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

\*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.

T S Type J Code (**See codes below)	Ordinary Dividends	Qualified Dividends	Total Cap Gain Distributions	Section 1250	Sec. 199A	28% Capital Gain	Tax Exempt Dividends	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Taxes Paid	Prior Year Information
<b>1</b>	Payer										
	Amounts										
<b>2</b>	Payer										
	Amounts										
<b>3</b>	Payer										
	Amounts										
<b>4</b>	Payer										
	Amounts										
<b>5</b>	Payer										
	Amounts										
<b>6</b>	Payer										
	Amounts										
<b>7</b>	Payer										
	Amounts										
<b>8</b>	Payer										
	Amounts										
<b>9</b>	Payer										
	Amounts										
<b>10</b>	Payer										
	Amounts										

<b>**Dividend Codes</b>	
Blank = Other	3 = Nominee

## Seller Financed Mortgage Interest Income

Please provide copies of all Form 1099-INT or other statements reporting interest income.

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_

Payer's name \_\_\_\_\_

Payer's street address \_\_\_\_\_

Payer's city, state, zip code \_\_\_\_\_

Payer's social security number \_\_\_\_\_

Interest income amount received in 2023 \_\_\_\_\_ [1]



**Please provide all Schedules Q.**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_[1]  
Name of activity \_\_\_\_\_  
Employer identification number \_\_\_\_\_  
State postal code \_\_\_\_\_

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_[1]  
Name of activity \_\_\_\_\_  
Employer identification number \_\_\_\_\_  
State postal code \_\_\_\_\_

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**NOTES/QUESTIONS:**





## Consolidated Broker Statement

Please provide copies of the Consolidated Broker Statement - Include all pages and all inserts

Preparer use only

T/S/J _____	Employer identification number _____
Broker Name _____	Margin interest _____
Account number _____	Investment management/advisory fees _____

\*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.

Type Code	1099-INT	Interest Income	Tax Exempt Income	Penalty on Early Withdrawal	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Taxes Paid	Prior Year Information
1	Payer							
	Amounts							
2	Payer							
	Amounts							
3	Payer							
	Amounts							
4	Payer							
	Amounts							
5	Payer							
	Amounts							

Type Code	1099-DIV	Ordinary Dividends	Qualified Dividends	Total Cap Gain Distr	Section 1250	Sec. 199A	28% Capital Gain	Tax Exempt Dividends	US Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Tax Paid	Prior Year Information
1	Payer											
	Amounts											
2	Payer											
	Amounts											
3	Payer											
	Amounts											
4	Payer											
	Amounts											
5	Payer											
	Amounts											

### Form 1099-B Proceeds From Broker and Barter Exchange Transactions

Description of Property	Date Acquired	Date Sold	Gross Sales Price <small>(Less expenses of sale)</small>	Cost or Other Basis
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Description of Account - Aggregate profit/-loss on contracts	-Loss/Gain Entire Yr	1099-B Adjustment	Net 1256 loss carryback	
_____	_____	_____	_____	

Control Totals

	<b>2023 Information</b>	<b>Prior Year Information</b>
State and local income tax refunds	_____ [5]	

	<b>T/S</b>	<b>Agreement Date</b>	<b>2023 Information</b>	<b>Prior Year Information</b>
Alimony received	—	_____	_____ [3]	
	—	_____	_____ [3]	

**\*\*Unemployment benefits are taxable income and should be reported on your return. Your 1099-G should show both the amount received and any amount of tax withheld. You may need to go to your state's Department of Labor website to get your 1099-G from your account.**

	<b>Taxpayer</b>	<b>Spouse</b>	<b>Prior Year Information</b>
Unemployment compensation**	_____ [9]	_____ [10]	
Unemployment compensation federal withholding	_____ [9]	_____ [10]	
Unemployment compensation state withholding	_____ [9]	_____ [10]	
Unemployment compensation repaid	_____ [12]	_____ [13]	
Alaska Permanent Fund dividends	_____ [18]	_____ [19]	

	<b>T/S/J</b>	<b>Self-Employment Income ? (Y, N)</b>		<b>2023 Information</b>	<b>Prior Year Information</b>
			Other income, such as: Commissions, Jury pay, Director fees, Taxable scholarships	_____ [15]	
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		
—	—		_____		

**NOTES/QUESTIONS:**

Miscellaneous Income #1

Please provide all Forms 1099-MISC

Preparer use only

Table with 3 columns: 2023 Information, Prior Year Information, and Preparer use only. Rows include Name of payer, Taxpayer/Spouse/Joint, State postal code, Rents (Box 1), Royalties (Box 2), Other income (Box 3), Federal income tax withheld (Box 4), Fishing boat proceeds (Box 5), Medical and health care payments (Box 6), Payer made direct sales of \$5,000 or more of consumer products (Box 7), Substitute payments in lieu of dividends or interest (Box 8), Crop Insurance proceeds (Box 9), Gross proceeds paid to an attorney (Box 10), Fish purchased for resale (Box 11), Section 409A deferrals (Box 12), Excess golden parachute payments (Box 14), Nonqualified deferred compensation (Box 15), State tax withheld (Box 16), State/Payer's state no. (Box 17), and State income (Box 18).

Control Totals

Miscellaneous Income #2

Please provide all Forms 1099-MISC

Preparer use only

Table with 3 columns: 2023 Information, Prior Year Information, and Preparer use only. Rows include Name of payer, Taxpayer/Spouse/Joint, State postal code, Rents (Box 1), Royalties (Box 2), Other income (Box 3), Federal income tax withheld (Box 4), Fishing boat proceeds (Box 5), Medical and health care payments (Box 6), Payer made direct sales of \$5,000 or more of consumer products (Box 7), Substitute payments in lieu of dividends or interest (Box 8), Crop Insurance proceeds (Box 9), Gross proceeds paid to an attorney (Box 10), Fish purchased for resale (Box 11), Section 409A deferrals (Box 12), Excess golden parachute payments (Box 14), Nonqualified deferred compensation (Box 15), State tax withheld (Box 16), State/Payer's state no. (Box 17), and State income (Box 18).

Control Totals

NOTES/QUESTIONS:

### Nonemployee Compensation #1

Please provide all Forms 1099-NEC

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Preparer use only

**2023 Information**

**Prior Year Information**

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Nonemployee compensation **(Box 1)** \_\_\_\_\_ [13]  
 Payer made direct sales of \$5,000 or more of consumer products **(Box 2)** \_\_\_\_\_ [15]  
 Federal income tax withheld **(Box 4)** \_\_\_\_\_ [17]  
 State tax withheld **(Box 5)** \_\_\_\_\_ [19]  
 State/Payer's state no. **(Box 6)** \_\_\_\_\_ [21]  
 State income **(Box 7)** \_\_\_\_\_ [22]


	<b>Control Totals</b>	
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### Nonemployee Compensation #2

Please provide all Forms 1099-NEC

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Preparer use only

**2023 Information**

**Prior Year Information**

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Nonemployee compensation **(Box 1)** \_\_\_\_\_ [13]  
 Payer made direct sales of \$5,000 or more of consumer products **(Box 2)** \_\_\_\_\_ [15]  
 Federal income tax withheld **(Box 4)** \_\_\_\_\_ [17]  
 State tax withheld **(Box 5)** \_\_\_\_\_ [19]  
 State/Payer's state no. **(Box 6)** \_\_\_\_\_ [21]  
 State income **(Box 7)** \_\_\_\_\_ [22]


	<b>Control Totals</b>	
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**NOTES/QUESTIONS:**

### Payment Card and Third Party Network Transactions #1

Please provide all Forms 1099-K

Preparer use only

#### 2023 Information

#### Prior Year Information

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Gross amount of payment card/third party network transactions **(Box 1)** \_\_\_\_\_ [17]  
 Card not present transactions **(Box 1b)** \_\_\_\_\_ [19]  
 Federal income tax withheld **(Box 4)** \_\_\_\_\_ [21]  
 State postal code **(Box 6)** \_\_\_\_\_ [23]  
 State identification number **(Box 7)** \_\_\_\_\_ [25]  
 State tax withheld **(Box 8)** \_\_\_\_\_ [26]

Prior Year Information box with lines for data entry

Control Totals

### Payment Card and Third Party Network Transactions #2

Please provide all Forms 1099-K

Preparer use only

#### 2023 Information

#### Prior Year Information

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Gross amount of payment card/third party network transactions **(Box 1)** \_\_\_\_\_ [17]  
 Card not present transactions **(Box 1b)** \_\_\_\_\_ [19]  
 Federal income tax withheld **(Box 4)** \_\_\_\_\_ [21]  
 State postal code **(Box 6)** \_\_\_\_\_ [23]  
 State identification number **(Box 7)** \_\_\_\_\_ [25]  
 State tax withheld **(Box 8)** \_\_\_\_\_ [26]

Prior Year Information box with lines for data entry

Control Totals

NOTES/QUESTIONS:



**Taxable Distributions Received from Cooperatives #1**

Please provide all Forms 1099-PATR

Preparer use only

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Patron dividends (Box 1) \_\_\_\_\_ [10]  
 Nonpatronage distributions (Box 2) \_\_\_\_\_ [12]  
 Per-unit retain allocations (Box 3) \_\_\_\_\_ [14]  
 Federal income tax withheld (Box 4) \_\_\_\_\_ [16]  
 Redeemed nonqualified notices (Box 5) \_\_\_\_\_ [18]  
 Section 199A(g) deduction (Box 6) \_\_\_\_\_ [23]  
 Qualified payments (Section 199A(b)(7) (Box 7) \_\_\_\_\_ [24]  
 Section 199A(a) qual items (Box 8) \_\_\_\_\_ [25]  
 Section 199A(a) SSTB items (Box 9) \_\_\_\_\_ [26]  
 Investment credit (Box 10) \_\_\_\_\_ [27]  
 Work opportunity credit (Box 11) \_\_\_\_\_ [29]  
 Patron's AMT adjustments \_\_\_\_\_ [31]  
 Other credits and deductions #1 (Box 12) \_\_\_\_\_ [33]  
 Other credits and deductions #2 (Box 12) \_\_\_\_\_ [35]  
 Specified Coop (Box 13) \_\_\_\_\_ [37]

**Control Totals**

**Taxable Distributions Received from Cooperatives #2**

Please provide all Forms 1099-PATR

Preparer use only

Name of payer \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Patron dividends (Box 1) \_\_\_\_\_ [10]  
 Nonpatronage distributions (Box 2) \_\_\_\_\_ [12]  
 Per-unit retain allocations (Box 3) \_\_\_\_\_ [14]  
 Federal income tax withheld (Box 4) \_\_\_\_\_ [16]  
 Redeemed nonqualified notices (Box 5) \_\_\_\_\_ [18]  
 Section 199A(g) deduction (Box 6) \_\_\_\_\_ [23]  
 Qualified payments (Section 199A(b)(7) (Box 7) \_\_\_\_\_ [24]  
 Section 199A(a) qual items (Box 8) \_\_\_\_\_ [25]  
 Section 199A(a) SSTB items (Box 9) \_\_\_\_\_ [26]  
 Investment credit (Box 10) \_\_\_\_\_ [27]  
 Work opportunity credit (Box 11) \_\_\_\_\_ [29]  
 Patron's AMT adjustments \_\_\_\_\_ [31]  
 Other credits and deductions #1 (Box 12) \_\_\_\_\_ [33]  
 Other credits and deductions #2 (Box 12) \_\_\_\_\_ [35]  
 Specified Coop (Box 13) \_\_\_\_\_ [37]

**Control Totals**

**NOTES/QUESTIONS:**

**Cancellation of Debt, Abandonment #1**

Please provide all Forms 1099-C and 1099-A

Preparer use only

Enter a brief description of the debt (i.e. type of debt) and why it was canceled to assist in determining tax ramifications:

\_\_\_\_\_ [51]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]

State postal code \_\_\_\_\_ [6]

Name of creditor/lender \_\_\_\_\_ [3]

**Form 1099-C Cancellation of Debt**

Date of identifiable event (Box 1) \_\_\_\_\_ [10]

Amount of debt discharged (Box 2) \_\_\_\_\_ [11]

Interest if included in box 2 (Box 3) \_\_\_\_\_ [12]

Personally liable for repayment of the debt (if checked) (Box 5) \_\_\_\_\_ [13]

Identifiable event code (Box 6) (A = Bankruptcy, B = Other judicial debt relief, C = Statue of limitations, D = Foreclosure, E = Debt relief from probate  
F = By agreement, G = Decision to discontinue collection, H = Other actual discharge) \_\_\_\_\_ [14]

Fair market value of property (Box 7) \_\_\_\_\_ [15]

**Form 1099-A Acquisition or Abandonment of Secured Property**

Date of lender's acquisition or knowledge of abandonment (Box 1) \_\_\_\_\_ [16]

Balance of principal outstanding (Box 2) \_\_\_\_\_ [17]

Fair market value of property (Box 4) \_\_\_\_\_ [18]

Personally liable for repayment of the debt (if checked) (Box 5) \_\_\_\_\_ [19]

**Control Totals**

**Cancellation of Debt, Abandonment #2**

Please provide all Forms 1099-C and 1099-A

Preparer use only

Enter a brief description of the debt (i.e. type of debt) and why it was canceled to assist in determining tax ramifications:

\_\_\_\_\_ [51]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]

State postal code \_\_\_\_\_ [6]

Name of creditor \_\_\_\_\_ [3]

**Form 1099-C Cancellation of Debt**

Date of identifiable event (Box 1) \_\_\_\_\_ [10]

Amount of debt discharged (Box 2) \_\_\_\_\_ [11]

Interest if included in box 2 (Box 3) \_\_\_\_\_ [12]

Personally liable for repayment of the debt (if checked) (Box 5) \_\_\_\_\_ [13]

Identifiable event code (Box 6) (A = Bankruptcy, B = Other judicial debt relief, C = Statue of limitations, D = Foreclosure, E = Debt relief from probate  
F = By agreement, G = Decision to discontinue collection, H = Other actual discharge) \_\_\_\_\_ [14]

Fair market value of property (Box 7) \_\_\_\_\_ [15]

**Form 1099-A Acquisition or Abandonment of Secured Property**

Date of lender's acquisition or knowledge of abandonment (Box 1) \_\_\_\_\_ [16]

Balance of principal outstanding (Box 2) \_\_\_\_\_ [17]

Fair market value of property (Box 4) \_\_\_\_\_ [18]

Personally liable for repayment of the debt (if checked) (Box 5) \_\_\_\_\_ [19]

**Control Totals**

**NOTES/QUESTIONS:**

### Gambling Winnings #1

Please provide all copies of Form W-2G.

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)	_____	[1]	
Payer name	_____	[3]	
State postal code	_____	[4]	
Mark if professional gambler	_____	[9]	
Reportable winnings (Box 1)	_____	[11]	_____
Date won (Box 2)	_____	[13]	_____
Type of wager (Box 3)	_____	[15]	_____
Federal withholding (Box 4)	_____	[17]	_____
Transaction (Box 5)	_____	[19]	_____
Race (Box 6)	_____	[21]	_____
Identical wager winnings (Box 7)	_____	[23]	_____
Cashier (Box 8)	_____	[25]	_____
Taxpayer identification number (Box 9)	_____	[27]	_____
Window (Box 10)	_____	[28]	_____
First ID (Box 11)	_____	[30]	_____
Second ID (Box 12)	_____	[31]	_____
Payer's state ID no. (Box 13)	_____	[32]	_____
State winnings (Box 14)	_____	[33]	_____
State withholding (Box 15)	_____	[35]	_____
Local winnings (Box 16)	_____	[37]	_____
Local withholding (Box 17)	_____	[39]	_____
Name of locality (Box 18)	_____	[42]	_____

**Control Totals**

### Gambling Winnings #2

Please provide all copies of Form W-2G.

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S)	_____	[1]	
Payer name	_____	[3]	
State postal code	_____	[4]	
Mark if professional gambler	_____	[9]	
Reportable winnings (Box 1)	_____	[11]	_____
Date won (Box 2)	_____	[13]	_____
Type of wager (Box 3)	_____	[15]	_____
Federal withholding (Box 4)	_____	[17]	_____
Transaction (Box 5)	_____	[19]	_____
Race (Box 6)	_____	[21]	_____
Identical wager winnings (Box 7)	_____	[23]	_____
Cashier (Box 8)	_____	[25]	_____
Taxpayer identification number (Box 9)	_____	[27]	_____
Window (Box 10)	_____	[28]	_____
First ID (Box 11)	_____	[30]	_____
Second ID (Box 12)	_____	[31]	_____
Payer's state ID no. (Box 13)	_____	[32]	_____
State winnings (Box 14)	_____	[33]	_____
State withholding (Box 15)	_____	[35]	_____
Local winnings (Box 16)	_____	[37]	_____
Local withholding (Box 17)	_____	[39]	_____
Name of locality (Box 18)	_____	[42]	_____

**Control Totals**

**NOTES/QUESTIONS:**

### Shareholders Undistributed Capital Gain #1

Please provide all copies of Form 2439

	2023 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains (Box 1a)	_____ [9]	
Unrecaptured section 1250 gain (Box 1b)	_____ [11]	
Section 1202 gain (Box 1c)	_____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone, 3 = 75% exclusion, 4 = 100% exclusion)		
Collectibles (28%) gain (Box 1d)	_____ [15]	
Tax paid by the RIC or REIT on the box 1a gains (Box 2)	_____ [17]	
	_____ [19]	

**Control Totals**

### Shareholders Undistributed Capital Gain #2

Please provide all copies of Form 2439

	2023 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains (Box 1a)	_____ [9]	
Unrecaptured section 1250 gain (Box 1b)	_____ [11]	
Section 1202 gain (Box 1c)	_____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone, 3 = 75% exclusion, 4 = 100% exclusion)		
Collectibles (28%) gain (Box 1d)	_____ [15]	
Tax paid by the RIC or REIT on the box 1a gains (Box 2)	_____ [17]	
	_____ [19]	

**Control Totals**

### Shareholders Undistributed Capital Gain #3

Please provide all copies of Form 2439

	2023 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_____ [1]	<div style="border: 1px solid black; height: 100%; width: 100%;"></div>
RIC or REIT name	_____ [3]	
State postal code	_____ [4]	
Total undistributed long-term capital gains (Box 1a)	_____ [9]	
Unrecaptured section 1250 gain (Box 1b)	_____ [11]	
Section 1202 gain (Box 1c)	_____ [13]	
If your interest in the RIC/REIT was held on the date the RIC/REIT acquired the Section 1202 stock and continuously until sold indicate the appropriate section 1202 code (1 = 50% exclusion, 2 = 60% exclusion within an empowerment zone, 3 = 75% exclusion, 4 = 100% exclusion)		
Collectibles (28%) gain (Box 1d)	_____ [15]	
Tax paid by the RIC or REIT on the box 1a gains (Box 2)	_____ [17]	
	_____ [19]	

**Control Totals**

**NOTES/QUESTIONS:**

Subject to self-employment tax code (T = Taxpayer, S = Spouse, J = Joint) \_\_\_\_\_ [1]  
 Mark to indicate all the elections that apply:  
 Mixed straddle election \_\_\_\_\_ [2]  
 Mixed straddle account election (Attach explanation) \_\_\_\_\_ [3]  
 \_\_\_\_\_ [3]  
 Straddle-by-straddle identification election \_\_\_\_\_ [4]  
 Net section 1256 contracts loss election \_\_\_\_\_ [5]

**Section 1256 Contracts Marked to Market**

Identification of Account A \_\_\_\_\_ [6]  
 Identification of Account B \_\_\_\_\_  
 Identification of Account C \_\_\_\_\_

	Account A	Account B	Account C
Taxpayer/Spouse/Joint (T, S, J)	—	—	—
State postal code	—	—	—
-Loss/Gain for entire year (Enter losses as a negative amount)	_____	_____	_____
Total Form 1099-B adjustment	_____	_____	_____
Total net 1256 contract loss carryback	_____	_____	_____

**Gains and Losses From Straddles**

Description of Property A \_\_\_\_\_ [7]  
 Name of Contract \_\_\_\_\_  
 Component \_\_\_\_\_ Type \_\_\_\_\_  
 Description of Property B \_\_\_\_\_  
 Name of Contract \_\_\_\_\_  
 Component \_\_\_\_\_ Type \_\_\_\_\_  
 Description of Property C \_\_\_\_\_  
 Name of Contract \_\_\_\_\_  
 Component \_\_\_\_\_ Type \_\_\_\_\_  
 Description of Property D \_\_\_\_\_  
 Name of Contract \_\_\_\_\_  
 Component \_\_\_\_\_ Type \_\_\_\_\_

	Property A	Property B	Property C	Property D
Taxpayer/Spouse/Joint (T, S, J)	—	—	—	—
State postal code	—	—	—	—
Date entered into/acquired	_____	_____	_____	_____
Date closed out/sold	_____	_____	_____	_____
Gross sales price	_____	_____	_____	_____
Cost plus expense of sale	_____	_____	_____	_____
Unrecognized gain	_____	_____	_____	_____

**Unrecognized Gain From Positions Held on Last Business Day**

Description of Property A \_\_\_\_\_ [8]  
 Description of Property B \_\_\_\_\_  
 Description of Property C \_\_\_\_\_

	Property A	Property B	Property C
Date acquired	_____	_____	_____
Fair market value on last business day	_____	_____	_____
Cost or other basis as adjusted	_____	_____	_____

Enter foreign employer compensation that was not reported to you on Form 1099-MISC.

Taxpayer/Spouse (T/S) \_\_\_\_\_ [3]  
 State \_\_\_\_\_ [4]

Foreign Employer Identification (ID) number \_\_\_\_\_ [1]  
 Foreign Employer Name \_\_\_\_\_ [2]  
 Foreign Employer Address \_\_\_\_\_  
     Foreign street address \_\_\_\_\_ [6]  
     Foreign city \_\_\_\_\_ [7]  
     Foreign country code/name \_\_\_\_\_ [8] \_\_\_\_\_ [9]  
     Foreign province/county \_\_\_\_\_ [10]  
     Foreign postal code \_\_\_\_\_ [11]  
     Name "in care of" \_\_\_\_\_ [12]

Employee address, if different from home address on Organizer Form ID: 1040  
 Enter U.S. (street, city, state, zip code) OR foreign (street, city, country, province, postal code)  
 Street address \_\_\_\_\_ [13]  
 City, state, zip code \_\_\_\_\_ [14] \_\_\_\_\_ [15] \_\_\_\_\_ [16]  
 Foreign country code/name \_\_\_\_\_ [17] \_\_\_\_\_ [18]  
 Foreign province/county \_\_\_\_\_ [19]  
 Foreign postal code \_\_\_\_\_ [20]

**Income**

	<b>2023 Information</b>	<b>Prior Year Information</b>
Foreign employer compensation	_____ [22]	<input type="text"/>

**NOTES/QUESTIONS:**

### Pension, Annuity, and IRA Distributions #1

Please provide all Forms 1099-R.

#### 2023 Information

#### Prior Year Information

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Name of payer \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [6]  
 Gross distributions received **(Box 1)** \_\_\_\_\_ [8]  
 Taxable amount received **(Box 2a)** \_\_\_\_\_ [10]  
 Federal withholding **(Box 4)** \_\_\_\_\_ [12]  
 Distribution code **(Box 7)** \_\_\_\_\_ [15]  
 Mark if distribution is from an IRA, SEP, SIMPLE retirement plan \_\_\_\_\_ [17]  
 State withholding **(Box 14)** \_\_\_\_\_ [18]  
 Local withholding **(Box 17)** \_\_\_\_\_ [20]  
 Amount of rollover \_\_\_\_\_ [22]  
 Mark if distribution was due to a pre-retirement age disability \_\_\_\_\_ [24]


Control Totals

### Pension, Annuity, and IRA Distributions #2

Please provide all Forms 1099-R.

#### 2023 Information

#### Prior Year Information

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Name of payer \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [6]  
 Gross distributions received **(Box 1)** \_\_\_\_\_ [8]  
 Taxable amount received **(Box 2a)** \_\_\_\_\_ [10]  
 Federal withholding **(Box 4)** \_\_\_\_\_ [12]  
 Distribution code **(Box 7)** \_\_\_\_\_ [15]  
 Mark if distribution is from an IRA, SEP, SIMPLE retirement plan \_\_\_\_\_ [17]  
 State withholding **(Box 14)** \_\_\_\_\_ [18]  
 Local withholding **(Box 17)** \_\_\_\_\_ [20]  
 Amount of rollover \_\_\_\_\_ [22]  
 Mark if distribution was due to a pre-retirement age disability \_\_\_\_\_ [24]


Control Totals

### Pension, Annuity, and IRA Distributions #3

Please provide all Forms 1099-R.

#### 2023 Information

#### Prior Year Information

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Name of payer \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [6]  
 Gross distributions received **(Box 1)** \_\_\_\_\_ [8]  
 Taxable amount received **(Box 2a)** \_\_\_\_\_ [10]  
 Federal withholding **(Box 4)** \_\_\_\_\_ [12]  
 Distribution code **(Box 7)** \_\_\_\_\_ [15]  
 Mark if distribution is from an IRA, SEP, SIMPLE retirement plan \_\_\_\_\_ [17]  
 State withholding **(Box 14)** \_\_\_\_\_ [18]  
 Local withholding **(Box 17)** \_\_\_\_\_ [20]  
 Amount of rollover \_\_\_\_\_ [22]  
 Mark if distribution was due to a pre-retirement age disability \_\_\_\_\_ [24]


Control Totals

#### NOTES/QUESTIONS:

### Social Security, Tier 1 Railroad Benefits

Please provide a copy of Form(s) SSA-1099 or RRB-1099

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
State postal code \_\_\_\_\_ [3]

#### Social Security Benefits

	2023 Information	Prior Year Information
If you received a Form SSA - 1099, please complete the following information: From the DESCRIPTION OF AMOUNT IN BOX 3 area of Form SSA-1099:		
Medicare premiums	_____ [7]	<div style="border: 1px solid black; height: 80px; width: 100%;"></div>
Prescription drug (Part D) premiums	_____ [9]	
Net Benefits for 2023 (Box 3 minus Box 4) <b>(Box 5)</b>	_____ [12]	
Voluntary Federal Income Tax Withheld <b>(Box 6)</b>	_____ [14]	

#### Tier 1 Railroad Benefits

	2023 Information	Prior Year Information
If you received a Form RRB - 1099, please complete the following information:		
Net Social Security Equivalent Benefit:		<div style="border: 1px solid black; height: 60px; width: 100%;"></div>
Portion of Tier 1 Paid in 2023 <b>(Box 5)</b>	_____ [22]	
Federal Income Tax Withheld <b>(Box 10)</b>	_____ [25]	
Medicare Premium Total <b>(Box 11)</b>	_____ [27]	

#### Additional Information About Benefits Received

Additional information about the benefits received not reported above. For example did you repay any benefits in 2023 or receive any prior year benefits in 2023. This information will be reported in the SSA-1099 DESCRIPTION OF AMOUNT IN BOX 3 area or in the RRB-1099 Boxes 7 through 9

\_\_\_\_\_ [40]  
 \_\_\_\_\_ [41]  
 \_\_\_\_\_ [42]  
 \_\_\_\_\_ [43]  
 \_\_\_\_\_ [44]

#### NOTES/QUESTIONS:



## Traditional IRA

**Taxpayer**

**Spouse**

Are you or your spouse (if MFJ or MFS) covered by an employer's retirement plan? (Y, N) \_\_\_\_\_ [1] \_\_\_\_\_ [2]

Do you want to contribute the maximum allowable traditional IRA contribution amount? If yes, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible) \_\_\_\_\_ [3] \_\_\_\_\_ [4]

Enter the total traditional IRA contributions made for use in 2023 \_\_\_\_\_ [5] \_\_\_\_\_ [6]

**Taxpayer**

**Spouse**

Enter the nondeductible contribution amount made for use in 2023 \_\_\_\_\_ [5] \_\_\_\_\_ [6]

Enter the nondeductible contribution amount made in 2024 for use in 2023 \_\_\_\_\_ [7] \_\_\_\_\_ [8]

Traditional IRA basis \_\_\_\_\_ [17] \_\_\_\_\_ [18]

Value of all your traditional IRA's on December 31, 2023: \_\_\_\_\_ [19] \_\_\_\_\_ [20]


## Roth IRA

**Please provide copies of any 1998 through 2022 Form 8606 not prepared by this office**

**Taxpayer**

**Spouse**

Mark if you want to contribute the maximum Roth IRA contribution \_\_\_\_\_ [29] \_\_\_\_\_ [30]

Enter the total Roth IRA contributions made for use in 2023 \_\_\_\_\_ [31] \_\_\_\_\_ [32]

Enter the amount a 2023 Roth IRA conversion should be adjusted by \_\_\_\_\_ [39] \_\_\_\_\_ [40]

Enter the total contribution Roth IRA basis on December 31, 2022 \_\_\_\_\_ [43] \_\_\_\_\_ [44]

Enter the total Roth IRA contribution recharacterizations for 2023 \_\_\_\_\_ [45] \_\_\_\_\_ [46]

Enter the Roth conversion IRA basis on December 31, 2022 \_\_\_\_\_ [47] \_\_\_\_\_ [48]

Value of all your Roth IRA's on December 31, 2023: \_\_\_\_\_ [49] \_\_\_\_\_ [50]


**NOTES/QUESTIONS:**

**Preparer use only**

- Business activity or profession name \_\_\_\_\_ [3]
- Taxpayer/Spouse (T, S) \_\_\_\_\_ [4]
- State postal code \_\_\_\_\_ [5]
- Contribute the maximum allowable contribution amount? (1 = Keogh, 2 = SEP, 3 = SIMPLE 401(k), 4 = Solo 401(k), 5 = SIMPLE IRA, 6 = SARSEP) \_\_\_\_\_ [6]
- Plan contribution rate. Enter in xx.xx format (Limitation percentage) \_\_\_\_\_ [7]
- Enter the total amount of contributions made to a Keogh plan in 2023 \_\_\_\_\_ [8]
- Enter the total amount of contributions made to a Solo 401(k) plan in 2023 \_\_\_\_\_ [9]
- Enter the total amount of contributions made to a SEP plan in 2023 \_\_\_\_\_ [10]
- Enter the total amount of contributions made to a SARSEP plan in 2023 \_\_\_\_\_ [11]
- Enter the total amount of contributions made to a defined benefit plan in 2023 \_\_\_\_\_ [12]
- Enter the total amount of contributions made to a profit-sharing plan in 2023 \_\_\_\_\_ [13]
- Enter the total amount of contributions made to a money purchase plan in 2023 \_\_\_\_\_ [14]
- Enter the total amount of contributions made to a SIMPLE 401(k) plan in 2023 \_\_\_\_\_ [15]
- Enter the total amount of contributions to a SIMPLE IRA plan in 2023 \_\_\_\_\_ [16]

**Catch-up Contributions**

- Enter the amount of catch-up contributions made to a Solo 401(k) or SARSEP in 2023 \_\_\_\_\_ [17]
- Enter the amount of catch-up contributions made to a SIMPLE Plan in 2023 \_\_\_\_\_ [18]

**Elective Deferrals**

- Enter the total contributions to a Solo 401(k) or SARSEP made through elective deferrals in 2023 \_\_\_\_\_ [19]
- Enter the amount of elective deferrals designated as Roth contributions in 2023 \_\_\_\_\_ [20]

**NOTES/QUESTIONS:**

**Preparer use only**

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse/Joint (T, S, J)	_____ [2]	
Employer identification number	_____ [3]	
Business name	_____ [5]	
Principal business/profession	_____ [6]	
Business code	_____ [12]	_____
Business address, if different from home address on Organizer Form ID: 1040		
Address	_____ [15]	
City/State/Zip	_____ [16]    _____ [17] _____ [18]	
Accounting method (1 = Cash, 2 = Accrual, 3 = Other)	_____ [19]	_____
If other:	_____ [21]	
Inventory method (1 = Cost, 2 = LCM, 3 = Other)	_____ [22]	_____
If other enter explanation:	_____ [24]	
_____		
_____		
Enter an explanation if there was a change in determining your inventory:	_____ [25]	
_____		
_____		
Did you "materially participate" in this business? (Y, N)	_____ [26]	_____
If not, number of hours you did significantly participate	_____ [28]	_____
Mark if you began or acquired this business in 2023	_____ [30]	
Did you make any payments in 2023 that require you to file Form(s) 1099? (Y, N)	_____ [31]	_____
If "Yes", did you or will you file all required Forms 1099? (Y, N)	_____ [33]	_____
Mark if this business is considered related to qualified services as a minister or religious worker	_____ [35]	_____
Did you receive wages as a statutory employee or as a minister? (1 = Statutory employee, 2 = Minister)	_____ [37]	_____
Medical insurance premiums paid by this activity	_____ [40]	_____
Long-term care premiums paid by this activity	_____ [44]	_____
Amount of wages received as a statutory employee	_____ [47]	_____

**Business Income**

**2023 Information**

**Prior Year Information**

Gross receipts and sales	_____ [52]	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Returns and allowances	_____ [55]	_____
Other income:	_____ [57]	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Cost of Goods Sold**

**2023 Information**

**Prior Year Information**

Beginning inventory	_____ [59]	_____
Purchases	_____ [61]	_____
Labor:	_____ [63]	_____
_____	_____	_____
Materials	_____ [65]	_____
Other costs:	_____ [67]	_____
_____	_____	_____
_____	_____	_____
Ending inventory	_____ [69]	_____

**Control Totals**

**Preparer use only**

Principal business or profession \_\_\_\_\_

**2023 Information**

**Prior Year Information**

Advertising	_____	[6]
Car and truck expenses	_____	[8]
Commissions and fees	_____	[10]
Contract labor	_____	[12]
Depletion	_____	[14]
Depreciation	_____	[16]
Employee benefit programs (Include Small Employer Health Ins Premiums credit):		
_____	_____	[18]
_____	_____	
Insurance (Other than health):		
_____	_____	[20]
_____	_____	
Interest:		
Mortgage (Paid to banks, etc.)		
_____	_____	[22]
_____	_____	
_____	_____	
Other:		
_____	_____	[24]
_____	_____	
Legal and professional services	_____	[26]
Office expense	_____	[29]
Pension and profit sharing:		
_____	_____	[31]
_____	_____	
Rent or lease:		
Vehicles, machinery, and equipment	_____	[33]
Other business property	_____	[35]
Repairs and maintenance	_____	[37]
Supplies	_____	[39]
Taxes and licenses:		
_____	_____	[41]
_____	_____	
_____	_____	
_____	_____	
Travel and meals:		
Travel	_____	[43]
Meals (Enter 100% subject to 50% limitation)	_____	[45]
Meals (Enter 100% subject to DOT 80% limit)	_____	[47]
Meals (Fully deductible)	_____	[49]
Utilities	_____	[51]
Wages (Less employment credit):		
_____	_____	[53]
_____	_____	
Other expenses:		
_____	_____	[55]
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	

**Preparer use only**

Principal business or profession \_\_\_\_\_

<b>Preparer use only Carryovers</b>	<b>Non-QBI &amp; Tax</b>	<b>For QBI &amp; Tax</b>	<b>AMT</b>
Operating	[19]	[20]	[21]
Short-term capital		[22]	[23]
Long-term capital		[24]	[25]
28% rate capital		[26]	[27]
Section 1231 loss	[28]	[29]	[30]
Ordinary business gain/loss	[31]	[32]	[33]
Section 179	[34]	[35]	[36]

**NOTES/QUESTIONS:**

**Preparer use only**

	2023 Information	Prior Year Information
Description _____	[2]	
Taxpayer/Spouse/Joint (T, S, J) ___[3]	State postal code _____	
Physical address: Street _____	[6]	
City, state, zip code _____ [7] ___ [8]	[9]	
Foreign country _____	[11]	
Foreign province/county _____	[12]	
Foreign postal code _____	[13]	
Type (1=Single-family, 2=Multi-family, 3=Vacation/short-term, 4=Commercial, 5=Land, 6=Royalty, 7=Self-rental, 8=Other, 9=Personal ppty) [14]		
Description of other type (Type code #8) _____	[15]	
Did you make any payments in 2023 that require you to file Form(s) 1099? (Y,N) _____	[16]	_____
If "Yes", did you or will you file all required Forms 1099? (Y, N) _____	[18]	_____
Fair rental days (If not full year) (For types 1, 2, 4, 5, 7 and 8 only) (Use Rent-2 for type 3) _____	[20]	
Percentage of ownership if not 100% _____	[22]	
Business use percentage, if not 100% (Not vacation home percentage) _____	[24]	

**Rent and Royalty Income**

Rents and royalties	2023 Information	Prior Year Information
_____	_____ [33]	_____
_____	_____	_____

**Rent and Royalty Expenses**

	2023 Information	Percent if not 100%	Prior Year Information
Advertising _____	_____ [35]	_____ [36]	_____
Auto _____	_____ [38]	_____ [39]	_____
Travel _____	_____ [41]	_____ [42]	_____
Cleaning and maintenance _____	_____ [44]	_____ [45]	_____
Commissions: _____	_____ [47]	_____ [49]	_____
Insurance: _____	_____ [50]	_____ [52]	_____
Legal and professional fees _____	_____ [54]	_____ [55]	_____
Management fees: _____	_____ [57]	_____ [59]	_____
Mortgage interest paid to banks, etc (Form 1098) _____	_____ [60]	_____ [62]	_____
Other mortgage interest _____	_____ [63]	_____ [65]	_____
Qualified mortgage insurance premiums _____	_____ [66]	_____ [67]	_____
Other interest: _____	_____ [69]	_____ [71]	_____
Repairs _____	_____ [72]	_____ [73]	_____
Supplies _____	_____ [75]	_____ [76]	_____
Taxes: _____	_____ [78]	_____ [80]	_____
Utilities _____	_____ [81]	_____ [82]	_____
Depreciation _____	_____ [84]	_____ [85]	_____
Depletion _____	_____ [87]	_____ [88]	_____
Other expenses: _____	_____ [90]	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Preparer use only**

Description \_\_\_\_\_

**Refinancing Points**

**Preparer - Enter on Screen Rent**

	<b>2023 Information</b>	<b>Prior Year Information</b>	
<b>Refinancing points paid -</b>			
Recipient's/Lender's name _____	[92]		
Date of refinance _____			
Total # Payments _____			
Reported on 1098 in 2023 _____			
Total points paid _____			
Points deemed as paid in current year <b>(Preparer use only)</b> _____			
<b>Refinancing points paid -</b>			
Recipient's/Lender's name _____			
Date of refinance _____			
Total # Payments _____			
Reported on 1098 in 2023 _____			
Total points paid _____			
Points deemed as paid in current year <b>(Preparer use only)</b> _____			
<b>Refinancing points paid -</b>			
Recipient's/Lender's name _____			
Date of refinance _____			
Total # Payments _____			
Reported on 1098 in 2023 _____			
Total points paid _____			
Points deemed as paid in current year <b>(Preparer use only)</b> _____			

**Vacation Home Information**

**Preparer - Enter on Screen Rent-3**

	<b>2023 Information</b>	<b>Prior Year Information</b>
Number of days home was used personally _____	[5]	
Number of days home was rented _____	[7]	
Number of day home owned, if not 365 _____	[9]	
Carryover of disallowed operating expenses into 2023 _____	[21]	
Carryover of disallowed depreciation expenses into 2023 _____	[22]	

**Passive and Other Information**

**Preparer - Enter on Screen Rent-2**

<b>Preparer use only</b>			
<b>Carryovers</b>	<b>Non-QBI and Tax</b>	<b>For QBI &amp; Tax</b>	<b>AMT</b>
Operating	[25]	[26]	[27]
Short-term capital		[28]	[29]
Long-term capital		[30]	[31]
28% rate capital		[32]	[33]
Section 1231 loss	[34]	[35]	[36]
Ordinary business gain/loss	[37]	[38]	[39]
Section 179	[40]	[41]	[42]

**NOTES/QUESTIONS:**

Please provide all Forms 1099-K

**Preparer use only**

	2023 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	_____ [2]	
Employer identification number	_____ [3]	
Description	_____ [4]	
Principal Product	_____ [5]	
State postal code	_____ [6]	
Accounting method (1 = Cash, 2 = Accrual)	_____ [7]	
Agricultural activity code	_____ [9]	_____
Did you "materially participate" in this business? (Y, N)	_____ [12]	_____
Did you make any payments in 2023 that require you to file Form(s) 1099? (Y, N)	_____ [14]	_____
If "Yes", did you or will you file all required Forms 1099? (Y, N)	_____ [16]	_____
Mark if Schedule F net income or loss should be excluded from self-employment income	_____ [18]	_____
Medical insurance premiums paid by this activity	_____ [21]	_____
Long-term care premiums paid by this activity	_____ [25]	_____

**Schedule F Income**

Sales Code**	Income description	2023 Information	Prior Year Information
—	_____	_____ [35]	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____

**\*\* Sales Codes**

<b>1 = Cash sales of items bought for resale</b>	<b>4 = Custom hire (machine work)</b>
<b>2 = Cash sales of items raised</b>	<b>5 = Other income</b>
<b>3 = Accrual sales</b>	

	2023 Information	Prior Year Information
Cost or other basis of livestock and other items you bought for resale (Cash method)	_____ [37]	_____
Beginning inventory of livestock and other items (Accrual method)	_____ [39]	_____
Accrual cost of livestock, produce, grains, and other products purchased	_____ [41]	_____
Ending Inventory of livestock and other items (Accrual method)	_____ [43]	_____
Total cooperative distributions you received	_____ [45]	_____
Taxable cooperative distributions you received	_____ [47]	_____

	2023 Total	2023 Taxable	Prior Year Information
Agricultural program payments	_____	_____	_____ [50]
_____	_____	_____	_____
_____	_____	_____	_____

	2023 Information	Prior Year Information
CRP payments received while enrolled to receive social security or disability benefits	_____ [52]	_____
Commodity credit loans reported under election:	_____ [54]	_____
_____	_____	_____
Total commodity credit loans forfeited	_____ [56]	_____
Taxable commodity credit loans forfeited	_____ [58]	_____

	2023 Total	2023 Taxable	Prior Year Information
Total crop insurance proceeds you received in 2023	_____	_____	_____ [61]
_____	_____	_____	_____
_____	_____	_____	_____
Mark if electing to defer crop insurance proceeds to 2024	_____ [63]	_____	_____
Crop insurance proceeds deferred from 2022	_____ [65]	_____	_____

**Control Totals**



Preparer use only

Description

	2023 Information	Prior Year Information
Car and truck expenses	[5]	
Chemicals	[7]	
Conservation expenses	[9]	
Carryover from prior years	[11]	
Custom hire (machine work)	[13]	
Depreciation	[15]	
Employee benefit programs (Include Small Employer Health Ins Premiums credit)	[17]	
Feed purchased	[19]	
Fertilizers and lime	[21]	
Freight and trucking	[23]	
Gasoline, fuel, and oil	[25]	
Insurance (Other than health)		
_____	[28]	
_____		
_____		
Mortgage interest (Paid to banks, etc.)		
_____	[30]	
_____		
_____		
Other interest	[32]	
Labor hired (Less employment credit)	[34]	
Pension and profit sharing	[36]	
Rent - vehicles, machinery, and equipment	[38]	
Rent - other	[40]	
Repairs and maintenance	[42]	
Seed and plants purchased	[44]	
Storage and warehousing	[46]	
Supplies purchased	[48]	
Taxes:		
_____	[50]	
_____		
_____		
_____		
Utilities	[52]	
Veterinary, breeding, and medicine	[54]	
Other expenses:		
_____	[56]	
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
Preproductive period expenses	[58]	

**Preparer use only**

Description \_\_\_\_\_

<b>Preparer use only Carryovers</b>	<b>Non-QBI &amp; Tax</b>	<b>For QBI &amp; Tax</b>	<b>AMT</b>
Operating	[19]	[20]	[21]
Short-term capital		[22]	[23]
Long-term capital		[24]	[25]
28% rate capital		[26]	[27]
Section 1231 loss	[28]	[29]	[30]
Ordinary business gain/loss	[31]	[32]	[33]
Section 179	[34]	[35]	[36]

**NOTES/QUESTIONS:**

**Preparer use only**

	2023 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	____ [2]	
Employer identification number	____ [3]	
Description	____ [4]	
State postal code	____ [5]	
Did you "actively participate" in the operation of this business this year? (Y, N)	____ [6]	

**Income Items**

	2023 Information	Prior Year Information
Income from production of livestock, produce, grains, and other crops:		
_____	_____ [15]	
_____	_____	
_____	_____	
_____	_____	
Total cooperative distributions you received	_____ [17]	
Taxable cooperative distributions you received	_____ [19]	

	2023 Total	2023 Taxable	Prior Year Information
Agricultural program payments:			
_____	_____ [21]	_____ [22]	
_____	_____	_____	

	2023 Information	Prior Year Information
Commodity credit loans reported under election:		
_____	_____ [24]	
_____	_____	
Total commodity credit loans forfeited	_____ [26]	
Taxable commodity credit loans forfeited	_____ [28]	

	2023 Total	2023 Taxable	Prior Year Information
Crop insurance proceeds you received in 2023			
_____	_____ [30]	_____ [31]	
_____	_____	_____	

	2023 Information	Prior Year Information
Mark if electing to defer crop insurance proceeds to 2024	_____ [33]	_____
Crop insurance proceeds deferred from 2022	_____ [35]	_____
Other income:	_____ [38]	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Preparer use only**

Description \_\_\_\_\_

**2023 Information**

**Prior Year Information**

Car and truck expenses	_____ [6]	_____
Chemicals	_____ [8]	_____
Conservation expenses	_____ [10]	_____
Carryover from prior years	_____ [12]	_____
Custom hire (machine work)	_____ [14]	_____
Depreciation	_____ [16]	_____
Employee benefit programs	_____ [18]	_____
Feed purchased	_____ [20]	_____
Fertilizers and lime	_____ [22]	_____
Freight and trucking	_____ [24]	_____
Gasoline, fuel, and oil	_____ [26]	_____
Insurance (Other than health):		
_____	_____ [28]	_____
_____	_____	_____
Mortgage interest (Paid to banks, etc.):		
_____	_____ [30]	_____
_____	_____	_____
Other interest	_____ [33]	_____
Labor hired (Less employment credit)	_____ [35]	_____
Pension and profit sharing	_____ [37]	_____
Rent - vehicles, machinery, and equipment	_____ [39]	_____
Rent - other	_____ [41]	_____
Repairs and maintenance	_____ [43]	_____
Seed and plants purchased	_____ [45]	_____
Storage and warehousing	_____ [47]	_____
Supplies purchased	_____ [49]	_____
Taxes:		
_____	_____ [51]	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Utilities	_____ [53]	_____
Veterinary, breeding, and medicine	_____ [55]	_____
Other expenses:		
_____	_____ [57]	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Preproductive period expenses	_____ [59]	_____

<b>Preparer use only Carryovers</b>	<b>Non-QBI &amp; Tax</b>	<b>For QBI &amp; Tax</b>	<b>AMT</b>
Operating	_____ [68]	_____ [69]	_____ [70]
Short-term capital		_____ [72]	_____ [73]
Long-term capital		_____ [74]	_____ [75]
28% rate capital		_____ [76]	_____ [77]
Section 1231 loss		_____ [78]	_____ [79]
Ordinary business gain/loss	_____ [82]	_____ [83]	_____ [84]
Section 179	_____ [87]	_____ [88]	_____ [89]

**Control Totals**

Please provide copies of Schedules K-1 showing income from partnerships and S-corporations.

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [6]  
 Name of entity \_\_\_\_\_ [13]  
 State postal code \_\_\_\_\_ [14]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership) \_\_\_\_\_ [17]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1-7	Operating	[16]	[17]	[18]
	Short-term capital		[19]	[20]
	Long-term capital		[21]	[22]
	28% rate capital		[23]	[24]
	Section 1231 loss		[25]	[26]
	Ordinary business gain/loss	[28]	[29]	[30]
	Other losses - 1040 Sch 1	[31]	[32]	[33]
	Section 179	[34]	[35]	[36]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [6]  
 Name of entity \_\_\_\_\_ [13]  
 State postal code \_\_\_\_\_ [14]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership) \_\_\_\_\_ [17]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1-7	Operating	[16]	[17]	[18]
	Short-term capital		[19]	[20]
	Long-term capital		[21]	[22]
	28% rate capital		[23]	[24]
	Section 1231 loss		[25]	[26]
	Ordinary business gain/loss	[28]	[29]	[30]
	Other losses - 1040 Sch 1	[31]	[32]	[33]
	Section 179	[34]	[35]	[36]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [6]  
 Name of entity \_\_\_\_\_ [13]  
 State postal code \_\_\_\_\_ [14]  
 Type of entity (1 = Partnership, 2 = S Corporation, 3 = Foreign partnership, 4 = Publicly traded partnership) \_\_\_\_\_ [17]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1-7	Operating	[16]	[17]	[18]
	Short-term capital		[19]	[20]
	Long-term capital		[21]	[22]
	28% rate capital		[23]	[24]
	Section 1231 loss		[25]	[26]
	Ordinary business gain/loss	[28]	[29]	[30]
	Other losses - 1040 Sch 1	[31]	[32]	[33]
	Section 179	[34]	[35]	[36]

Please provide all copies of Schedules K-1 showing income from estates and trusts.

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1T-3	Operating	[18]	[19]	[20]
	Short-term capital		[21]	[22]
	Long-term capital		[23]	[24]
	28% rate capital		[25]	[26]
	Section 1231 loss	[27]	[28]	[29]
	Ordinary business gain/loss	[30]	[31]	[32]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1T-3	Operating	[18]	[19]	[20]
	Short-term capital		[21]	[22]
	Long-term capital		[23]	[24]
	28% rate capital		[25]	[26]
	Section 1231 loss	[27]	[28]	[29]
	Ordinary business gain/loss	[30]	[31]	[32]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1T-3	Operating	[18]	[19]	[20]
	Short-term capital		[21]	[22]
	Long-term capital		[23]	[24]
	28% rate capital		[25]	[26]
	Section 1231 loss	[27]	[28]	[29]
	Ordinary business gain/loss	[30]	[31]	[32]

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 Employer identification number \_\_\_\_\_ [3]  
 Name of activity \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

	Preparer use only Carryovers	Non-QBI & Tax	For QBI & Tax	AMT
Enter on K1T-3	Operating	[18]	[19]	[20]
	Short-term capital		[21]	[22]
	Long-term capital		[23]	[24]
	28% rate capital		[25]	[26]
	Section 1231 loss	[27]	[28]	[29]
	Ordinary business gain/loss	[30]	[31]	[32]

Description \_\_\_\_\_ [1]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]  
 State postal code \_\_\_\_\_ [6]  
 Mark if electing to pay tax on entire gain (No exclusion will be calculated and entire gain will be reported on Schedule D) \_\_\_\_\_ [7]  
 Date former residence was acquired \_\_\_\_\_ [9]  
 Date former residence was sold \_\_\_\_\_ [10]  
 Selling price of former residence \_\_\_\_\_ [11]  
 Expenses related to the sale of your old home \_\_\_\_\_ [12]  
 Original cost of home sold including capital improvements \_\_\_\_\_ [13]

### Exclusion Information

Mark if meet use and ownership test without exceptions (2 years use within 5-year period preceding sale date) \_\_\_\_\_ [19]

	Taxpayer	Spouse
Reduced exclusion days: (Enter only days within 5-year period ending on sale date)		
Number of days each person used property as main home	_____ [21]	_____ [22]
Number of days each person owned property used as main home	_____ [23]	_____ [24]
Number of days between date of sale of the other home and date of sale of this home	_____ [25]	_____ [26]

### Form 6252 - Current Year Installment Sale

Mortgage and other debts the buyer assumed \_\_\_\_\_ [28]  
 Total current year payments received \_\_\_\_\_ [29]

### Form 6252 - Related Party Installment Sale Information

Related party name \_\_\_\_\_ [30]  
 Address \_\_\_\_\_ [31]  
 City, State and Zip \_\_\_\_\_ [32] [33] \_\_\_\_\_ [34]  
 Identifying number of related party \_\_\_\_\_ [35]  
 Was the property sold as a marketable security? (Y, N) \_\_\_\_\_ [36]  
 Enter date of second sale if more than 2 years after the first sale \_\_\_\_\_ [37]  
 Indicate special conditions if applicable (1 = Sale/exchange, 2 = Involuntary conv, 3 = Death of seller, 4 = No tax avoidance) \_\_\_\_\_ [38]  
 Selling price of property sold by a related party \_\_\_\_\_ [40]

### NOTES/QUESTIONS:

**Preparer use only**

	<b>2023 Information</b>	<b>Prior Year Information</b>
Description _____	[3]	<div style="border: 1px solid black; height: 200px; width: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[7]	
State postal code _____	[8]	
Date acquired _____	[19]	
Date sold _____	[20]	
Gross sales price of property sold _____	[21]	
Mortgage and other debts the buyer assumed _____	[23]	
Cost or other basis _____	[25]	
Commissions and other expenses of the sale _____	[27]	
Gross profit percentage _____	[29]	
Total current year principal payments received _____	[35]	
Prior year principal payments received _____	[37]	
Total ordinary income to recapture _____	[39]	
Total ordinary income previously recaptured _____	[41]	

	<b>Control Totals</b>		
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**Prior Year Installment Sale**

**Preparer use only**

	<b>2023 Information</b>	<b>Prior Year Information</b>
Description _____	[3]	<div style="border: 1px solid black; height: 200px; width: 100%;"></div>
Taxpayer/Spouse/Joint (T, S, J) _____	[7]	
State postal code _____	[8]	
Date acquired _____	[19]	
Date sold _____	[20]	
Gross sales price of property sold _____	[21]	
Mortgage and other debts the buyer assumed _____	[23]	
Cost or other basis _____	[25]	
Commissions and other expenses of the sale _____	[27]	
Gross profit percentage _____	[29]	
Total current year principal payments received _____	[35]	
Prior year principal payments received _____	[37]	
Total ordinary income to recapture _____	[39]	
Total ordinary income previously recaptured _____	[41]	

	<b>Control Totals</b>		
--	-----------------------	--	--

**NOTES/QUESTIONS:**



## Preparer use only

Description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [9]  
 State postal code \_\_\_\_\_ [10]  
 Mark to include gross proceeds for 1099-S reporting on Form 4797, line 1 \_\_\_\_\_ [16]  
 Mark if disposition is due to casualty or theft \_\_\_\_\_ [21]  
 Mark if disposition was to a related party \_\_\_\_\_ [22]

## Sale Information

Date acquired \_\_\_\_\_ [24]  
 Date sold \_\_\_\_\_ [25]  
 Gross sales price or insurance proceeds received \_\_\_\_\_ [26]  
 Cost or other basis \_\_\_\_\_ [27]  
 Commissions and other expenses of sale \_\_\_\_\_ [28]  
 Depreciation allowed or allowable \_\_\_\_\_ [29]

## Form 4797, Part III - Recapture

Additional depreciation after 1975 (Section 1250) \_\_\_\_\_ [31]  
 Applicable percentage (if not 100%) (Section 1250) \_\_\_\_\_ [32]  
 Additional depreciation after 1969 (Section 1250) \_\_\_\_\_ [33]  
 Soil, water and land clearing expenses (Section 1252) \_\_\_\_\_ [34]  
 Applicable percentage (if not 100%) (Section 1252) \_\_\_\_\_ [35]  
 Intangible drilling and development costs (Section 1254) \_\_\_\_\_ [36]  
 Applicable payments excluded from income under sec. 126 (Section 1255) \_\_\_\_\_ [37]

## Form 6252 - Current Year Installment Sale

Mortgage and other debts the buyer assumed \_\_\_\_\_ [38]  
 Total current year payments received \_\_\_\_\_ [39]

## Form 6252 - Related Party Installment Sale Information

Related party name \_\_\_\_\_ [40]  
 Address \_\_\_\_\_ [41]  
 City, State, and Zip \_\_\_\_\_ [42] [43] [44]  
 Identifying number of related party \_\_\_\_\_ [45]  
 Was the property sold as a marketable security? (Y, N) \_\_\_\_\_ [46]  
 Enter date of second sale \_\_\_\_\_ [47]  
 Indicate special conditions if applicable (1 = Sale/exchange, 2 = Involuntary conv, 3 = Death of seller, 4 = No tax avoidance) \_\_\_\_\_ [48]  
 Selling price of property sold by a related party \_\_\_\_\_ [50]

## NOTES/QUESTIONS:

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**Preparer use only**

Description of property given up \_\_\_\_\_ [4]  
 \_\_\_\_\_ [5]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [6]  
 State postal code \_\_\_\_\_ [7]  
 Description of property received \_\_\_\_\_ [10]  
 \_\_\_\_\_ [11]

### Date Information

Date the like-kind property given up was acquired \_\_\_\_\_ [17]  
 Date you transferred your property to the other party \_\_\_\_\_ [18]  
 Date the like-kind property received was identified \_\_\_\_\_ [19]  
 Date you received the like-kind property from the other party \_\_\_\_\_ [20]

### Gain and Basis Information

Fair market value of other property given up \_\_\_\_\_ [21]  
 Adjusted basis of other property given up \_\_\_\_\_ [22]  
 Cash received \_\_\_\_\_ [23]  
 Fair market value of other (not like-kind) property received \_\_\_\_\_ [24]  
 Installment obligation received in like-kind exchange \_\_\_\_\_ [25]  
 Fair market value of like-kind property you received \_\_\_\_\_ [26]  
 Fair market value of non-section 1245 property you received \_\_\_\_\_ [27]  
 Liabilities, including mortgages, assumed by you \_\_\_\_\_ [28]  
 Cash paid \_\_\_\_\_ [29]  
 Adjusted basis of like-kind property given up \_\_\_\_\_ [30]  
 Adjusted basis of like-kind property from pass through entity  
     Cost or other basis \_\_\_\_\_ [31]  
     Depreciation allowed or allowable excluding Section 179 \_\_\_\_\_ [32]  
     Section 179 expense deduction passed through \_\_\_\_\_ [33]  
     Section 179 carryover \_\_\_\_\_ [34]  
 Liabilities, including mortgages, assumed by the other party \_\_\_\_\_ [35]  
 Exchange expenses incurred by you \_\_\_\_\_ [36]

### Related Party Exchange Information

Name of related party \_\_\_\_\_ [39]  
 Address of related party \_\_\_\_\_ [40]  
 City \_\_\_\_\_ [41]  
 State \_\_\_\_\_ [42]  
 Zip code \_\_\_\_\_ [43]  
 Identifying number of related party \_\_\_\_\_ [44]  
 Relationship to you \_\_\_\_\_ [45]  
 During this tax year, did the related party sell or dispose of the property received? (Y, N) \_\_\_\_\_ [46]  
 During this tax year, did you sell or dispose of the like-kind property you received? (Y, N) \_\_\_\_\_ [47]  
 Indicate if any special conditions apply (1 = Death of either party, 2 = Involuntary conversion, 3 = No tax avoidance) \_\_\_\_\_ [48]  
 Mark if this exchange is a prior year like-kind exchange \_\_\_\_\_ [50]

### NOTES/QUESTIONS:

This form is used to report other foreign assets (not held in a foreign financial account), as required by the Internal Revenue Service. Report foreign financial assets held in a foreign financial account on Organizer Form ID: FrgnAcct.

	2023 Information	Prior Year Information
Asset description	_____ [2]	
Asset identifying number or other designation	_____ [3]	
Date asset acquired	_____ [4]	
Date asset disposed	_____ [6]	
Asset jointly owned with spouse	_____ [7]	
Maximum value of asset	_____ [9]	

**Asset foreign entity information** - (Enter either foreign entity information or issuer/counterparty information, but not both)

Type of foreign entity: (P = Partnership, C = Corporation, T = Trust, E = Estate) \_\_\_\_\_ [14]  
 Foreign entity name \_\_\_\_\_ [16]  
 Foreign entity address \_\_\_\_\_ [17]  
 City, state, zip code \_\_\_\_\_ [18] \_\_\_\_\_ [19] \_\_\_\_\_ [20]  
 Foreign country code/name \_\_\_\_\_ [21] \_\_\_\_\_ [22]  
 Foreign province/county \_\_\_\_\_ [23]  
 Foreign postal code \_\_\_\_\_ [24]

**Asset issuer or counterparty information** - (Enter either foreign entity information or issuer/counterparty information, but not both)

Type: (I = Issuer, C = Counterparty) \_\_\_\_\_ [25]  
 Entity: (I = Individual, P = Partnership, C = Corporation, T = Trust, E = Estate) \_\_\_\_\_  
 If an individual, select either U.S. or foreign (1 = U.S. Person, 2 = Foreign Person) \_\_\_\_\_  
 Individual or organization name \_\_\_\_\_  
 Address of issuer or counterparty \_\_\_\_\_  
 City, state, zip code \_\_\_\_\_  
 Foreign country code/name \_\_\_\_\_  
 Foreign province/county \_\_\_\_\_  
 Foreign postal code \_\_\_\_\_

**Asset issuer or counterparty information** - (Enter either foreign entity information or issuer/counterparty information, but not both)

Type: (I = Issuer, C = Counterparty) \_\_\_\_\_  
 Entity: (I = Individual, P = Partnership, C = Corporation, T = Trust, E = Estate) \_\_\_\_\_  
 If an individual, select either U.S. or foreign (1 = U.S. Person, 2 = Foreign Person) \_\_\_\_\_  
 Individual or organization name \_\_\_\_\_  
 Address of issuer or counterparty \_\_\_\_\_  
 City, state, zip code \_\_\_\_\_  
 Foreign country code/name \_\_\_\_\_  
 Foreign province/county \_\_\_\_\_  
 Foreign postal code \_\_\_\_\_

**NOTES/QUESTIONS:**

**This form is used to report financial accounts in foreign countries, as required by the Internal Revenue Service.**

Taxpayer/Spouse/Joint (T, S, J)

\_\_[1]

	<b>2023 Information</b>	<b>Prior Year Information</b>
Deposit or Custodial account (D= Deposit, C = Custodial)	__[4]	
Type of Account:		
Bank	__[5]	
Securities	__[6]	
Other	_____[7]	
Maximum value of account	_____[8]	
Account number or other designation	_____[10]	
Financial institution	_____[12]	
Address of financial institution	_____[13]	
City, state, zip code	_____[14] ____ [15] ____ [16]	
Foreign country code/name	____ [17] ____ [18]	
For addresses in Mexico, enter state	____ [20]	
Foreign province/county	____ [23]	
Foreign postal code	____ [24]	
Account jointly owned with spouse	__ [25]	
Account opened during the tax year	__ [47]	—
Account closed during the tax year	__ [49]	
Information is reported for a financial account which is:	__ [27]	

2 = Owned separately, 3 = Owned jointly, 4 = Authority over but no financial interest

**Complete this section if there is a joint owner other than the spouse, or you have signature authority only over the account**

Taxpayer identification number of account holder/joint owner	_____[28]
Foreign identification number of account holder/joint owner (If no Taxpayer identification number)	_____[29]
Last name or organization name of account holder/joint owner	_____[30]
First name and middle initial of account holder/joint owner	_____[31] ____ [32]
Address and apartment	_____[33] ____ [34]
City, state, zip code	_____[35] ____ [36] ____ [37]
Foreign country code/name	____ [38] ____ [39]
For addresses in Mexico, enter state	____ [41]
Foreign postal code	____ [44]
Number of joint owners (Not including taxpayer, if applicable)	____ [45]
Filer's title with this owner (If applicable)	____ [46]

**NOTES/QUESTIONS:**

**Foreign Earned Income Exclusion**

Taxpayer/Spouse (T, S) \_\_\_ [1] State postal code \_\_\_ [3]  
 Foreign street address \_\_\_ [4] City \_\_\_ [3]  
 State/Province \_\_\_\_\_ Country code \_\_\_\_\_  
 Country \_\_\_\_\_ Postal code \_\_\_\_\_  
 Employer's name \_\_\_\_\_ [2]  
 U.S. address \_\_\_\_\_ [5] City \_\_\_\_\_  
 State postal code \_\_\_\_\_ Zip code \_\_\_\_\_  
 Foreign street address \_\_\_ [6] City \_\_\_\_\_  
 State/Province \_\_\_\_\_ Country code \_\_\_\_\_  
 Country \_\_\_\_\_ Postal code \_\_\_\_\_  
 Employer type (A = Foreign entity, B = U.S. company, C = Self, D = Foreign affiliate of a U.S. company, E = Other) If other, specify type \_\_\_\_\_ [8]  
 Country of citizenship \_\_\_\_\_ [11]  
 If maintained a separate foreign residence for your family due to adverse living conditions, provide city, country, and days:  
 City/Country \_\_\_\_\_ [12] Days \_\_\_\_\_  
 City/Country \_\_\_\_\_ Days \_\_\_\_\_  
 List tax home(s) during the tax year and dates established:  
 Tax home \_\_\_\_\_ [13] Date \_\_\_\_\_  
 Tax home \_\_\_\_\_ Date \_\_\_\_\_

**Foreign Earned Income Allocation Information**

**\*U.S. Business Days and Travel Type Code: 1=Travel to United States; 2=Travel to restricted country; 3=Travel to foreign country**

U.S. business days and travel information [16]

Type Code*	Name of Country including United States	Date Arrived	Date Left	No. of U.S. business days
—	_____	_____	_____	_____
—	_____	_____	_____	_____
—	_____	_____	_____	_____
—	_____	_____	_____	_____
—	_____	_____	_____	_____
Foreign days worked before and after foreign assignment	_____ [17]	Total days worked before and after foreign assignment		_____ [18]
Total number of days worked during year (defaults to 240)				_____ [19]

**Bona Fide Residence Test**

Date foreign residence began \_\_\_\_\_ [21] Date foreign residence ended \_\_\_\_\_ [22]  
 Kind of foreign living quarters (A = Purchased house, B = Rented house or apartment, C = Rented room, D = Quarters furnished by employer) \_\_\_\_\_ [23]  
 If any family members lived abroad with you during any part of tax year, list who and for what period:  
 Relationship \_\_\_\_\_ Period abroad \_\_\_\_\_ [24]  
 Relationship \_\_\_\_\_ Period abroad \_\_\_\_\_  
 Relationship \_\_\_\_\_ Period abroad \_\_\_\_\_  
 Relationship \_\_\_\_\_ Period abroad \_\_\_\_\_  
 Mark if you submitted a statement to foreign country authorities that you are not a resident of that country \_\_\_\_\_ [25]  
 Mark if required to pay income tax to that country \_\_\_\_\_ [26]  
 List any contractual terms or other conditions relating to length of employment abroad \_\_\_\_\_ [27]  
 \_\_\_\_\_  
 Type of visa used to enter foreign country \_\_\_\_\_ [28]  
 Explanation if visa limited length of stay or employment \_\_\_\_\_ [29]  
 \_\_\_\_\_  
 If maintained a home in U.S., enter address, whether it was rented, names of occupants and their relationship to you:  
 Address \_\_\_\_\_ [30] City \_\_\_\_\_  
 State postal code \_\_\_\_\_ Zip code \_\_\_\_\_  
 Rented \_\_\_ Occupant \_\_\_\_\_ Relationship \_\_\_\_\_  
 Address \_\_\_\_\_ [30] City \_\_\_\_\_  
 State postal code \_\_\_\_\_ Zip code \_\_\_\_\_  
 Rented \_\_\_ Occupant \_\_\_\_\_ Relationship \_\_\_\_\_

**Physical Presence Test**

Principal country of employment \_\_\_\_\_ [31]

Employer's name \_\_\_\_\_  
 Taxpayer/Spouse (T, S) \_\_\_\_\_  
 State postal code \_\_\_\_\_

**Foreign Earned Income**

**\*Please use the Foreign Earned Income Allocation Codes located below**

	Allocation Code*	Amount
<b>Noncash income:</b>		
Home (lodging) _____	[10] ___ [11]	_____ [12]
Meals _____	[13] ___ [14]	_____ [15]
Car _____	[16] ___ [17]	_____ [18]
Other properties or facilities (Please enter code here and description and amount below):	___ [19]	_____ [20]
_____		_____
_____		_____
_____		_____
_____		_____
<b>Allowances, reimbursements or expenses paid on behalf:</b>		
Cost of living and overseas differential _____	___ [21]	_____ [22]
Family _____	___ [23]	_____ [24]
Education _____	___ [25]	_____ [26]
Home leave _____	___ [27]	_____ [28]
Quarters _____	___ [29]	_____ [30]
Other purposes (Please enter code here and description and amount below):	___ [31]	_____ [32]
_____		_____
_____		_____
_____		_____
_____		_____
Other foreign earned income (Please enter code here and description and amount below):	___ [33]	_____ [34]
_____		_____
_____		_____
_____		_____
_____		_____
Excludable meals and lodging under section 119 _____		_____ [35]

**\*Foreign Earned Income Allocation Codes**

**1 = 100% foreign during assignment**  
**2 = 100% U.S. during assignment**  
**3 = U.S. and foreign days worked during assignment**  
**4 = U.S. and foreign days before/after assignment**  
**5 = Days worked before, during, and after assignment**

**Deductions Allocable to Foreign Earned Income**

	Allocation Code*	Amount
Other allocable deductions _____	___ [36]	_____ [37]

**Housing Exclusion/Deduction**

Qualified housing expense \_\_\_\_\_ [47]

**NOTES/QUESTIONS:**

**Preparer use only**

Description of move	_____	[2]
Taxpayer/Spouse/Joint (T, S, J)	_____	[3]
Mark if the move was due to service in the armed forces	_____	[7]
Number of miles from old home to new workplace	_____	[8]
Number of miles from old home to old workplace	_____	[9]
Mark if move is outside United States or its possessions	_____	[10]
Transportation and storage expenses	_____	[11]
Travel and lodging (not including meals)	_____	[12]
Miles driven to new home	_____	[13]
Total amount reimbursed for moving expenses	_____	[15]

**NOTES/QUESTIONS:**





**Preparer use only**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [2]  
 Occupation in which expenses were incurred \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [4]

**Vehicle Questions**

If you used your automobile for work purposes, please answer the following questions:

	<b>2023 Information</b>	<b>Prior Year Information</b>
Was the vehicle available for off-duty personal use? (Y, N, Blank = Not applicable)	___ [5]	___
Was another vehicle available for personal use? (Y, N)	___ [7]	___
Do you have evidence to support your deduction? (1 = Yes - written, 2 = Yes - not written, 3 = No)	___ [9]	

**Vehicle Information**

Vehicle 1 -	Date placed in service	_____ [11]
	Description	_____ [12]
	Comments	_____
Vehicle 2 -	Date placed in service	_____ [59]
	Description	_____ [60]
	Comments	_____
Vehicle 3 -	Date placed in service	_____ [107]
	Description	_____ [108]
	Comments	_____
Vehicle 4 -	Date placed in service	_____ [155]
	Description	_____ [156]
	Comments	_____

**Vehicles Actual Expenses**

Mileage Information	Vehicle 1	Prior Year Information	Vehicle 2	Prior Year Information	Vehicle 3	Prior Year Information	Vehicle 4	Prior Year Information
Total mileage for the year	_____ [18]		_____ [66]		_____ [114]		_____ [162]	
Business miles	_____ [20]		_____ [68]		_____ [116]		_____ [164]	
Average daily round trip commuting mileage	_____ [23]		_____ [71]		_____ [119]		_____ [167]	
Total commuting mileage	_____ [25]		_____ [73]		_____ [121]		_____ [169]	
Gasoline	_____ [27]		_____ [75]		_____ [123]		_____ [171]	
Oil	_____ [29]		_____ [77]		_____ [125]		_____ [173]	
Repairs	_____ [31]		_____ [79]		_____ [127]		_____ [175]	
Maintenance	_____ [33]		_____ [81]		_____ [129]		_____ [177]	
Tires	_____ [35]		_____ [83]		_____ [131]		_____ [179]	
Car washes	_____ [37]		_____ [85]		_____ [133]		_____ [181]	
Insurance	_____ [39]		_____ [87]		_____ [135]		_____ [183]	
Interest	_____ [41]		_____ [89]		_____ [137]		_____ [185]	
Registration	_____ [43]		_____ [91]		_____ [139]		_____ [187]	
Licenses	_____ [45]		_____ [93]		_____ [141]		_____ [189]	
Property taxes (Plates, tags, etc)	_____ [47]		_____ [95]		_____ [143]		_____ [191]	
Vehicle rentals	_____ [49]		_____ [97]		_____ [145]		_____ [193]	
Inclusion amt (Preparer only)	_____ [51]		_____ [99]		_____ [146]		_____ [195]	
Other vehicle expenses	_____ [53]		_____ [101]		_____ [149]		_____ [197]	
Value of employer provided vehicle	_____ [55]		_____ [103]		_____ [151]		_____ [199]	
Depreciation	_____ [57]		_____ [105]		_____ [153]		_____ [201]	

Alimony Paid:

T/S	Date*	2023 Information		Prior Year Information
		Recipient name and SSN	Address	
			[4]	
		Recipient name and SSN		
		Address		
		City, state and zip code		
		Recipient name and SSN		
		Address		
		City, state and zip code		
		Recipient name and SSN		
		Address		
		City, state and zip code		

\* Date of divorce/separation agreement

	2023 Information		Prior Year Information
	Taxpayer	Spouse	
Educator expenses:	[6]	[7]	
Other adjustments:	[9]	[10]	

**NOTES/QUESTIONS:**

Exclusion of Interest Income from Series EE or I U.S. Savings Bonds

Complete if you cashed qualified U.S. Savings bonds in 2023 that were issued after 1989, and you paid qualified higher education expenses in 2023 for yourself, your spouse, or your dependents.

Taxpayer/Spouse/Joint (T, S, J)
SSN of person enrolled at eligible educational institution
Name of person enrolled at eligible educational institution (First/Last)
Name of eligible educational institution
Address of eligible educational institution
City, state, and zip code
Qualified higher education expenses you paid in 2023 for person listed above [1]
Enter any nontaxable educational benefits received for 2023 for person listed above
Type of qualified education program, if contributions made for enrollee (ESA = Coverdell ESA, QTP = Qualified Tuition Program)
Financial institution name (ESA) or name of program (QTP)
Financial institution address (ESA) or address of program (QTP)
City, state and zip code

Taxpayer/Spouse/Joint (T, S, J)
SSN of person enrolled at eligible educational institution
Name of person enrolled at eligible educational institution (First/Last)
Name of eligible educational institution
Address of eligible educational institution
City, state, and zip code
Qualified higher education expenses you paid in 2023 for person listed above [1]
Enter any nontaxable educational benefits received for 2023 for person listed above
Type of qualified education program, if contributions made for enrollee (ESA = Coverdell ESA, QTP = Qualified Tuition Program)
Financial institution name (ESA) or name of program (QTP)
Financial institution address (ESA) or address of program (QTP)
City, state and zip code

Taxpayer/Spouse/Joint (T, S, J)
SSN of person enrolled at eligible educational institution
Name of person enrolled at eligible educational institution (First/Last)
Name of eligible educational institution
Address of eligible educational institution
City, state, and zip code
Qualified higher education expenses you paid in 2023 for person listed above [1]
Enter any nontaxable educational benefits received for 2023 for person listed above
Type of qualified education program, if contributions made for enrollee (ESA = Coverdell ESA, QTP = Qualified Tuition Program)
Financial institution name (ESA) or name of program (QTP)
Financial institution address (ESA) or address of program (QTP)
City, state and zip code

Total proceeds from Series EE or I U.S. Savings bonds issued after 1989 and cashed in 2023 [3]

NOTES/QUESTIONS:

Complete this section if you paid interest on a qualified student loan in 2023 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan. Please provide all copies of Form 1098-E. Form 1098-E from the lender reports interest received in 2023. The amounts reported by the lender may differ from the amounts you actually paid.

TS	Qualified loan interest recipient/lender	2023 Interest Paid	Prior Year Information
—	_____	_____ [1]	<div style="border: 1px solid black; padding: 2px;">           _____            _____            _____         </div>
—	_____	_____	
—	_____	_____	
—	_____	_____	

**NOTES/QUESTIONS:**

## Education Credits and Tuition and Fees Deduction

Please provide all copies of Form 1098-T.

**Educational institutions use Form 1098-T to report qualified education expenses. An eligible educational institution is any college, university, or vocational school eligible to participate in a student aid program administered by the U.S. Department of Education.**

**Preparer - Enter on Screen Educate2**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [8]  
 Education Code (1=American Opportunity Credit, 2=Lifetime Learning Credit) \_\_\_\_\_  
 Student's social security number \_\_\_\_\_  
 Student's first name \_\_\_\_\_  
 Student's last name \_\_\_\_\_

### Institution Information

**Enter information from each institution on a separate page, including the complete address and federal identification number of the institution.**

Institution's federal identification number \_\_\_\_\_ [8]  
 Institution's name \_\_\_\_\_  
 Institution's street address \_\_\_\_\_  
 Institution's city, state, zip code \_\_\_\_\_

### Tuition Paid and Related Information

**Amounts reported in Box 1 may not reflect the actual amount paid for the student during 2023.  
 Enter the amount actually paid during 2023.**

	2023 Information	Prior Year Information
Tuition paid (Enter only the amount actually paid) <b>(Box 1)</b>	_____ [8]	<div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div>
Educational institution changed its reporting method for 2023 <b>(Box 3)</b>	_____	
Adjustments made for a prior year <b>(Box 4)</b>	_____	
Scholarships or grants <b>(Box 5)</b>	_____	
Adjustments to scholarships or grants for a prior year <b>(Box 6)</b>	_____	
Box 1 or 2 includes amounts for an academic period beginning January - March 2024 <b>(Box 7)</b>	_____	
At least half-time student <b>(Box 8)</b>	_____	
Graduate student <b>(Box 9)</b> (1=Yes, 2=No)	_____	
Insurance contract reimbursement/refund <b>(Box 10)</b>	_____	
Non-Institution expenses (Books and fees not paid directly to the educational institution)	_____	
American Opportunity Tax Credit (AOTC) disqualifier	_____	
1 = Not pursuing degree, 2 = Not enrolled at least half-time, 3 = Felony drug conviction, 4 = 4 yrs post-secondary education before 2023		

**NOTES/QUESTIONS:**

**Qualified Education Programs**  
Please provide all copies of Form 1099Q

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Payer name \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [4]  
 Type of account (1= Private QTP, 2 = State QTP, 3 = ESA) \_\_\_\_\_ [6]  
 Relationship to account (1 = Beneficiary, 2 = Account owner, 3 = Both, 4 = Neither) \_\_\_\_\_ [7]  
 Final distribution \_\_\_\_\_ [8]

**Contributions and Basis**

Beneficiary's Information (if not taxpayer or spouse)

Social security number \_\_\_\_\_ [11]  
 First name \_\_\_\_\_ [12]  
 Last name \_\_\_\_\_ [13]

	<b>2023 Information</b>	<b>Prior Year Information</b>
Amount contributed in current year	_____ [14]	_____ _____ _____
Basis of this account at 12/31/22	_____ [17]	
Value of this account at 12/31/23	_____ [19]	
Distribution by beneficiary of previously taxed contributions (if not taxpayer or spouse)	_____ [24]	

**Payments from Qualified Education Programs**

	<b>2023 Information</b>	<b>Prior Year Information</b>
Gross distribution ( <b>Box 1</b> )	_____ [30]	_____ _____ _____ _____ _____ _____ _____ _____ _____
Earnings ( <b>Box 2</b> )	_____ [32]	
Basis ( <b>Box 3</b> )	_____ [34]	
Trustee-to-trustee rollover ( <b>Box 4</b> )	_____ [36]	
Trustee-to-trustee rollover amount if different than Box 1	_____ [37]	
<b>Box 5 -</b>		
Private QTP	_____ [39]	
State QTP	_____ [40]	
Coverdell ESA	_____ [41]	
Check if the recipient is not the designated beneficiary ( <b>Box 6</b> )	_____ [42]	
Qualified education expenses	_____ [43]	
Elementary and secondary education expenses	_____ [45]	

**NOTES/QUESTIONS:**

**Complete a FAFSA information section for both the parent and student. Both may be required to complete the FAFSA. If the parent or student tax return was prepared elsewhere, please provide the completed tax return.**

This FAFSA information is for the:  **Preparer use only**

Who is listed as the primary taxpayer on the tax return of the individual to whom this information applies?

(1 = Father or stepfather, 2 = Mother or stepmother, 3 = Student, 4 = Student's spouse)

\_\_\_[1]

The information for the FAFSA worksheet will be:

(1 = Calculated for the taxpayer on this return, 2 = Entered from someone else's return)

\_\_\_[4]

Taxpayer's (and spouse's) current balance of all cash, savings and checking accounts

\_\_\_\_\_[8]

Taxpayer's (and spouse's) net worth in investments, including real estate but do not include the primary residence

\_\_\_\_\_[9]

Taxpayer's (and spouse's) net worth in current businesses and/or investment farms

\_\_\_\_\_[10]

	<b>2022 Information</b>	<b>2023 Information</b>
Child support paid because of divorce, separation, or a result of a legal requirement	_____[12]	_____[20]
Taxable earnings from need-based employment programs	_____[13]	_____[21]
Student grant and scholarship aid included in adjusted gross income	_____[14]	_____[22]
Earnings from work under a cooperative education program offered by a college	_____[15]	_____[23]
Child support received but do not include foster care or adoption payments	_____[16]	_____[24]
Veterans noneducation benefits	_____[17]	_____[25]
Other untaxed income not reported elsewhere, such as worker's compensation, disability, etc., but do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, on-base military housing or a military housing allowance, or combat pay.	_____[18]	_____[26]
Money received or paid on behalf of the student (For the student's worksheet only)	_____[19]	_____[27]

**Control Totals**

**Federal Student Aid Application Information #2**

This FAFSA information is for the:  **Preparer use only**

Who is listed as the primary taxpayer on the tax return of the individual to whom this information applies?

(1 = Father or stepfather, 2 = Mother or stepmother, 3 = Student, 4 = Student's spouse)

\_\_\_[1]

The information for the FAFSA worksheet will be:

(1 = Calculated for the taxpayer on this return, 2 = Entered from someone else's return)

\_\_\_[4]

Taxpayer's (and spouse's) current balance of all cash, savings and checking accounts

\_\_\_\_\_[8]

Taxpayer's (and spouse's) net worth in investments, including real estate but do not include the primary residence

\_\_\_\_\_[9]

Taxpayer's (and spouse's) net worth in current businesses and/or investment farms

\_\_\_\_\_[10]

	<b>2022 Information</b>	<b>2023 Information</b>
Child support paid because of divorce, separation, or a result of a legal requirement	_____[12]	_____[20]
Taxable earnings from need-based employment programs	_____[13]	_____[21]
Student grant and scholarship aid included in adjusted gross income	_____[14]	_____[22]
Earnings from work under a cooperative education program offered by a college	_____[15]	_____[23]
Child support received but do not include foster care or adoption payments	_____[16]	_____[24]
Veterans noneducation benefits	_____[17]	_____[25]
Other untaxed income not reported elsewhere, such as worker's compensation, disability, etc., but do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, on-base military housing or a military housing allowance, or combat pay.	_____[18]	_____[26]
Money received or paid on behalf of the student (For the student's worksheet only)	_____[19]	_____[27]

**NOTES/QUESTIONS:**

**Control Totals**

**Form ID: FAFSA**

## Schedule A - Medical and Dental Expenses

T/S/J	2023 Information	Prior Year Information
	Medical and dental expenses, such as: Doctors, Dentists, Hospital/nursing home fees, Lab/x-ray fees, Medical supplies, Hearing aids, Eyeglasses/contact lenses, and Insurance reimbursements received	
[1]	_____ [2]	_____
—	_____	_____
—	_____	_____
—	_____	_____
—	_____	_____
	Medical insurance premiums you paid: <small>Do not include pre-tax amounts paid by an employer-sponsored plan or amounts entered elsewhere, such as amounts paid for your self-employed business (Sch C, Sch F, Sch K-1, etc.) or Medicare premiums entered on Form SSA-1099.</small>	
[4]	_____ [5]	_____
—	_____	_____
—	_____	_____
—	_____	_____
	Long-term care premiums you paid: <small>Do not include pre-tax amounts paid by an employer-sponsored plan or amounts entered elsewhere, such as amounts paid for your self-employed business (Sch C, Sch F, Sch K-1, etc.)</small>	
[7]	_____ [8]	_____
—	_____	_____
	Prescription medicines and drugs:	
[10]	_____ [11]	_____
—	_____	_____
—	_____	_____
[13]	Miles driven for medical items (22 cents) _____ [14]	_____

## Schedule A - Tax Expenses

T/S/J	2023 Information	Prior Year Information
	State/local income taxes paid:	
[18]	_____ [19]	_____
—	_____	_____
—	_____	_____
—	_____	_____
—	_____	_____
	2022 state and local income taxes paid in 2023:	
[21]	_____ [22]	_____
—	_____	_____
—	_____	_____
	Real estate taxes paid:	
[24]	_____ [25]	_____
—	_____	_____
—	_____	_____
	Personal property taxes:	
[27]	_____ [28]	_____
—	_____	_____
	Other taxes, such as: foreign taxes and State disability taxes	
[30]	_____ [31]	_____
—	_____	_____
—	_____	_____
	Sales tax paid on major purchases:	
[36]	_____ [37]	_____
—	_____	_____
	Sales tax paid on actual expenses:	
[39]	_____ [40]	_____
—	_____	_____
—	_____	_____

**Control Totals**



T/S/J	Home mortgage interest: From Form 1098	2023 Interest Paid <sup>[2]</sup>	2023 Points Paid	Type*	Prior Year Information
[1]	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____
—	_____	_____	_____	_____	_____

**\*Mortgage Types**

**Blank = Used to buy, build or improve main/qualified second home 1 = Not used to buy, build, improve home or investment**

T/S/J	Payee's Name	SSN or EIN	2023 Information	Prior Year Information
	Other, such as: Home mortgage interest paid to individuals			
[4]	_____	_____	_____	[5]
	<b>Address</b>			
	<b>City, state and zip code</b>			
	_____			
	<b>Address</b>			
	<b>City, state and zip code</b>			
	_____			

**T/S/J Name and address of other person who received Form 1098 for jointly liable mortgage interest you paid -**

—	Payer's/Borrower's name	_____	[7]	
	Street Address	_____		
	City/State/Zip code	_____		
	<b>Refinancing Points paid in 2023 -</b>			
	Taxpayer/Spouse/Joint (T, S, J)	_____	[11]	
	Recipient/Lender name	_____		
	Total points paid at time of refinance	_____		
	Points deemed as paid in 2023 (Preparer use only)	_____	[12]	
	Date of refinance	_____		
	Term of new loan (in months)	_____		
	Reported on Form 1098 in 2023	_____		
	Taxpayer/Spouse/Joint (T, S, J)	_____	—	
	Recipient/Lender name	_____		
	Total points paid at time of refinance	_____		
	Points deemed as paid in 2023 (Preparer use only)	_____		
	Date of refinance	_____		
	Term of new loan (in months)	_____		
	Reported on Form 1098 in 2023	_____		

T/S/J	Investment interest expense, other than on Schedule(s) K-1:	2023 Information	Prior Year Information
[15]	_____	_____	[16]
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	_____	_____	_____

T/S/J

2023 Information

Prior Year Information

Contributions made by cash or check (including out-of-pocket expenses)

Any contribution of cash, a check or other monetary gift requires a written record of the contribution in order to claim the contribution on your return.

Individual contributions of \$250 or more must be accompanied by a written acknowledgment from the charity to claim the contribution on your return.

[2]	_____	[3]	_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
[5]	Volunteer miles driven	[6]	_____
	Noncash items, such as: Goodwill/Salvation Army/clothing/household goods		_____
[8]	_____	[9]	_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____

Miscellaneous Deductions

T/S/J

2023 Information

Prior Year Information

Other expenses

[12]	_____	[13]	_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
[15]	Gambling losses: (Enter only if you have gambling income)	[16]	_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____
—	_____		_____

NOTES/QUESTIONS:

### Miscellaneous Itemized Deductions (State Use Only)

Complete the information below only if you file a state return in AL, AR, CA, HI, MN, NY or PA. Amounts entered here will be used to calculate your state return, but will be ignored for federal return purposes, as the deductions are not allowed.

T/S/J

2023 Information

Prior Year Information

Unreimbursed expenses, such as: Uniforms, Professional dues,  
Business publications, Job seeking expenses, Educational expenses

__[1]		[2]	
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			

Union dues, other than amounts reported on Form W-2:

__[4]		[5]	
—			
—			
—			

__[7]	Tax preparation fees	[8]	
-------	----------------------	-----	--

Other expenses, subject to 2% AGI limit, such as: Legal/accounting/custodial fees

__[10]		[11]	
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			

__[13]	Safe deposit box rental	[14]	
--------	-------------------------	------	--

Investment expenses, other than on Schedule(s) K-1 or Form(s) 1099-DIV/INT:

__[16]		[17]	
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			
—			

**NOTES/QUESTIONS:**

Complete this section if either of the following applies:

- You have home acquisition/improvement debt over \$750,000 for loans taken out in 2018 or later
- You have home acquisition/improvement debt over \$1,000,000 for loans taken out in 2017 or earlier

Mortgages taken out before 10/14/87 generally qualify as grandfather debt regardless of how the proceeds are used.

Home acquisition debt is a mortgage taken out after 10/13/87, the proceeds of which are used to buy, build or substantially improve your home.

	2023 Information	Prior Year Information
Description of loan/property _____	[2]	
Taxpayer/Spouse/Joint (T, S, J) _____	[3]	
Loan origination date _____	[4]	
If refinanced debt, date of initial loan _____	[5]	
Fair market value of home _____	[6]	
Number of months loan was outstanding in 2023, if not 12 _____	[8]	_____
Number of months home was a qualifying home _____ <small>(If different from number of months loan was outstanding)</small>	[10]	_____
Principal paid in 2023 _____	[12]	_____
Interest paid during 2023 _____	[14]	_____
Points reported on Form 1098 for 2023 _____	[17]	_____
Home mortgage interest you paid, not reported on Form 1098:		
Recipient name _____	[20]	
Recipient SSN or EIN _____	[21]	
Recipient address _____	[22]	
Recipient city, state, zip code _____ [23] _____ [24] _____	[25]	
Grandfather debt as of 12/31/22 (or first day mortgage was outstanding) _____	[26]	_____
Grandfather debt as of 12/31/23 (or last day mortgage was outstanding) _____	[28]	_____
Home acquisition/improvement debt as of 12/31/22 (or first day mortgage was outstanding) _____	[30]	_____
Home acquisition/improvement debt as of 12/31/23 (or last day mortgage was outstanding) _____	[32]	_____
Home equity debt as of 12/31/22*** (or first day mortgage was outstanding) _____	[34]	_____
Home equity debt as of 12/31/23*** (or last day mortgage was outstanding) _____ <small>*** ONLY portion of loan proceeds used to buy, build, or improve qualified residence</small>	[36]	_____
Average balance in 2023 of grandfather debt _____	[41]	_____
Average balance in 2023 of home acquisition/improvement debt _____	[43]	_____
Average balance for 2023 all types of debt _____	[45]	_____

**NOTES/QUESTIONS:**

**Noncash Contributions Exceeding \$500**

**For donated securities, include the company name and number of shares in the donated property description, below**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis \_\_\_\_\_ [13]  
 Fair market value \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

**Control Totals**

**Noncash Contributions Exceeding \$500**

**For donated securities, include the company name and number of shares in the donated property description, below**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis \_\_\_\_\_ [13]  
 Fair market value \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

**Control Totals**

**Noncash Contributions Exceeding \$500**

**For donated securities, include the company name and number of shares in the donated property description, below**

Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [1]  
 Donated property description \_\_\_\_\_ [4]  
 Name of donee organization \_\_\_\_\_ [5]  
 Address of donee organization \_\_\_\_\_ [6]  
 City \_\_\_\_\_ [7]  
 State postal code \_\_\_\_\_ [8]  
 Zip code \_\_\_\_\_ [9]  
 Date contributed \_\_\_\_\_ [10]  
 Date acquired by donor \_\_\_\_\_ [11]  
 How was donated property acquired: (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [12]  
 Donor's cost or basis \_\_\_\_\_ [13]  
 Fair market value \_\_\_\_\_ [14]  
 Method used to determine fair market value (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [15]  
 If other: \_\_\_\_\_ [16]

**Control Totals**

**Please provide all Forms 1098-C. If you received a different acknowledgment from the donee organization in lieu of Form 1098-C, enter the equivalent donation information in the fields provided below.**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]

Donee's name \_\_\_\_\_ [4]

State postal code \_\_\_\_\_ [3]

Date of contribution **(Box 1)** \_\_\_\_\_ [9]

Odometer mileage **(Box 2a)** \_\_\_\_\_ [10]

Year of vehicle **(Box 2b)** \_\_\_\_\_ [11]

Make of vehicle **(Box 2c)** \_\_\_\_\_ [12]

Model of vehicle **(Box 2d)** \_\_\_\_\_ [13]

Vehicle or other identification number **(Box 3)** \_\_\_\_\_ [14]

Donee certifies that vehicle was sold in arm's length transaction to unrelated party **(Box 4a)** \_\_\_\_\_ [15]

Date of sale **(Box 4b)** \_\_\_\_\_ [16]

Gross proceeds from sale **(Box 4c)** \_\_\_\_\_ [17]

Donee certifies that vehicle will not be transferred for money, other property, or services before completion of material improvement or significant intervening use **(Box 5a)** \_\_\_\_\_ [18]

Donee certifies that vehicle is to be transferred to a needy individual for significantly below fair market value in furtherance of donee's charitable purpose **(Box 5b)** \_\_\_\_\_ [19]

Detailed description of material improvements or significant intervening use and duration of use **(Box 5c)** \_\_\_\_\_ [20]

\_\_\_\_\_ [20]

\_\_\_\_\_ [20]

\_\_\_\_\_ [20]

Did you provide goods or services in exchange for the vehicle? **(Box 6a)** Yes \_\_\_ [21] No \_\_\_ [22]

Value of goods and services provided in exchange for the vehicle **(Box 6b)** \_\_\_\_\_ [23]

Donee certifies that the goods and services consisted solely of intangible religious benefits **(Box 6c)** \_\_\_\_\_ [24]

Description of goods and services **(Box 6c)** \_\_\_\_\_ [25]

\_\_\_\_\_ [25]

\_\_\_\_\_ [25]

\_\_\_\_\_ [25]

Under the law, the donor may not claim a deduction of more than \$500 for this vehicle if this box is checked **(Box 7)** \_\_\_\_\_ [26]

**Other Information for Donated Property**

Overall physical condition of property \_\_\_\_\_ [31]

Date property was acquired by donor \_\_\_\_\_ [32]

How property was acquired by donor (P = Purchase, I = Inheritance, G = Gift, E = Exchange) \_\_\_\_\_ [33]

Donor's cost or basis \_\_\_\_\_ [34]

Fair market value on date of contribution \_\_\_\_\_ [35]

Method used to determine FMV (A = Appraisal, C = Catalog, T = Thrift shop value, S = Sales/comparative, O = Other) \_\_\_\_\_ [36]

If other: \_\_\_\_\_ [37]

Bargain sale amount received \_\_\_\_\_ [38]

Donee's address, and ZIP code \_\_\_\_\_ [42]

\_\_\_\_\_ [43] \_\_\_\_\_ [44] \_\_\_\_\_ [45]

Donee's telephone number \_\_\_\_\_ [46]

**NOTES/QUESTIONS:**

**Preparer use only**

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [7]

**Casualty and Theft - Business/Income Producing Properties**

Description of casualty or theft - Property A \_\_\_\_\_ [10]  
 Description of casualty or theft - Property B \_\_\_\_\_ [23]  
 Description of casualty or theft - Property C \_\_\_\_\_ [36]  
 Description of casualty or theft - Property D \_\_\_\_\_ [49]

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
Property type (1 = Business, 2 = Income producing, 3 = Employee prop)	___ [13]	___ [26]	___ [39]	___ [52]
Date acquired	_____ [17]	_____ [30]	_____ [43]	_____ [56]
Cost or other basis of property	_____ [18]	_____ [31]	_____ [44]	_____ [57]
Insurance or other reimbursement	_____ [19]	_____ [32]	_____ [45]	_____ [58]
Fair market value before casualty	_____ [20]	_____ [33]	_____ [46]	_____ [59]
Fair market value after casualty	_____ [21]	_____ [34]	_____ [47]	_____ [60]

**Business/Income Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [61]  
 Description of replacement property B \_\_\_\_\_ [65]  
 Description of replacement property C \_\_\_\_\_ [69]  
 Description of replacement property D \_\_\_\_\_ [73]

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
Mark if property was acquired from a related party	___ [62]	___ [66]	___ [70]	___ [74]
Date acquired	_____ [63]	_____ [67]	_____ [71]	_____ [75]
Cost of replacement property	_____ [64]	_____ [68]	_____ [72]	_____ [76]

**NOTES/QUESTIONS:**

**Preparer use only**

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [8]  
 Mark if casualty resulted due to a federally declared disaster. Federally declared disasters are determined by the President of the United States to warrant assistance by the Federal Government \_\_\_\_\_ [9]  
 FEMA disaster declaration number (ex. DR-4593-WA) \_\_\_\_\_ [10] - \_\_\_\_\_ [11]

**Casualty and Theft - Personal Use Properties**

Type of property	City	State	Zip code
Property A _____ [19]	_____ [20]	_____ [21]	_____ [22]
Property B _____ [36]	_____ [37]	_____ [38]	_____ [39]
Property C _____ [53]	_____ [54]	_____ [55]	_____ [56]
Property D _____ [70]	_____ [71]	_____ [72]	_____ [73]
	<b>A</b>	<b>B</b>	<b>C</b>
Date acquired _____ [27]	_____ [44]	_____ [61]	_____ [78]
Cost or other basis of property _____ [28]	_____ [45]	_____ [62]	_____ [79]
Insurance or other reimbursement _____ [29]	_____ [46]	_____ [63]	_____ [80]
Fair market value before casualty _____ [31]	_____ [48]	_____ [64]	_____ [81]
Fair market value after casualty _____ [32]	_____ [49]	_____ [65]	_____ [82]

**Personal Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [85]  
 Description of replacement property B \_\_\_\_\_ [89]  
 Description of replacement property C \_\_\_\_\_ [93]  
 Description of replacement property D \_\_\_\_\_ [97]

	A	B	C	D
Mark if property was acquired from a related party _____ [86]	_____ [90]	_____ [94]	_____ [98]	
Date acquired _____ [87]	_____ [91]	_____ [95]	_____ [99]	
Cost of replacement property _____ [88]	_____ [92]	_____ [96]	_____ [100]	

**NOTES/QUESTIONS:**



**Preparer use only**

Occurrence description \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]  
 Date of casualty or theft \_\_\_\_\_ [6]

**Prior Year Casualty and Theft - Business/Income Producing Properties (Cont'd)**

Description of casualty or theft - Property A \_\_\_\_\_ [8]  
 Description of casualty or theft - Property B \_\_\_\_\_ [17]  
 Description of casualty or theft - Property C \_\_\_\_\_ [26]  
 Description of casualty or theft - Property D \_\_\_\_\_ [35]

	A	B	C	D
Property type (1 = Business, 2 = Income producing, 3 = Employee prop) _____ [9]				_____ [36]
Date acquired _____ [12]				_____ [39]
Cost or other basis of property _____ [13]				_____ [40]
Insurance or other reimbursement _____ [14]				_____ [41]
Fair market value before casualty _____ [15]				_____ [42]
Fair market value after casualty _____ [16]				_____ [43]

**Current Year Business/Income Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [44]  
 Description of replacement property B \_\_\_\_\_ [50]  
 Description of replacement property C \_\_\_\_\_ [56]  
 Description of replacement property D \_\_\_\_\_ [62]

	A	B	C	D
Date acquired _____ [45]				_____ [63]
Prior year cost of replacement property _____ [46]				_____ [64]
Cost of replacement property _____ [47]				_____ [65]
Postponed gain _____ [48]				_____ [66]
Adjusted basis of replacement property _____ [49]				_____ [67]

**NOTES/QUESTIONS:**

Occurrence description \_\_\_\_\_ [1]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [2]  
 State postal code \_\_\_\_\_ [3]  
 Date of casualty or theft \_\_\_\_\_ [4]  
 Damage to personal residence from corrosive drywall \_\_\_\_\_ [5]  
 Amount paid to repair damage to home or household appliances \_\_\_\_\_ [6]  
 25% loss available from 2022 \_\_\_\_\_ [7]

**Prior Year Casualty and Theft - Personal Use Properties (Cont'd)**

Type of property A \_\_\_\_\_ [15] City A \_\_\_\_\_ [16]  
 Type of property B \_\_\_\_\_ [26] City B \_\_\_\_\_ [27]  
 Type of property C \_\_\_\_\_ [37] City C \_\_\_\_\_ [38]  
 Type of property D \_\_\_\_\_ [48] City D \_\_\_\_\_ [49]

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
State postal code	_____ [17]	_____ [28]	_____ [39]	_____ [50]
Zip code	_____ [18]	_____ [29]	_____ [40]	_____ [51]
Date acquired	_____ [20]	_____ [31]	_____ [42]	_____ [53]
Cost or other basis of property	_____ [21]	_____ [32]	_____ [43]	_____ [54]
Insurance or other reimbursement	_____ [22]	_____ [33]	_____ [44]	_____ [55]
Principal residence exclusion taken	_____ [23]	_____ [34]	_____ [45]	_____ [56]
Fair market value before casualty	_____ [24]	_____ [35]	_____ [46]	_____ [57]
Fair market value after casualty	_____ [25]	_____ [36]	_____ [47]	_____ [58]

**Personal Use Replacement Information**

Description of replacement property A \_\_\_\_\_ [59]  
 Description of replacement property B \_\_\_\_\_ [65]  
 Description of replacement property C \_\_\_\_\_ [71]  
 Description of replacement property D \_\_\_\_\_ [77]

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
Date acquired	_____ [60]	_____ [66]	_____ [72]	_____ [78]
Prior year cost of replacement property	_____ [61]	_____ [67]	_____ [73]	_____ [79]
Cost of replacement property	_____ [62]	_____ [68]	_____ [74]	_____ [80]
Postponed gain	_____ [63]	_____ [69]	_____ [75]	_____ [81]
Adjusted basis of replacement property	_____ [64]	_____ [70]	_____ [76]	_____ [82]

**NOTES/QUESTIONS:**

**Preparer use only**

Principal business or profession \_\_\_\_\_ [3]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [4]  
 State postal code \_\_\_\_\_ [5]

**Business Use of Home**

	2023 Information	Prior Year Information
Total area of home	_____ [14]	_____
Area used exclusively for business	_____ [16]	_____
Information for day-care facilities only:		
Total hours used for day-care during this year	_____ [18]	_____
Total hours used this year, if less than 8760	_____ [20]	_____
Special computation for certain day-care facilities:		
Area used regularly and exclusively for day-care business	_____ [22]	_____
Area used partly for day-care business	_____ [24]	_____

**List as direct expenses any expenses which are attributable only to the business part of your home.  
 List as indirect expenses any expenses which are attributable to the overall upkeep and running of your home.**

	2023 Information		Prior Year Information
	Direct Expenses	Indirect Expenses	
Mortgage interest:	_____ [29]	_____ [31]	_____
Real estate taxes:	_____ [37]	_____ [39]	_____
Excess mortgage interest	_____ [42]	_____ [43]	_____
Insurance	_____ [48]	_____ [50]	_____
Rent	_____ [54]	_____ [55]	_____
Repairs & maintenance	_____ [57]	_____ [58]	_____
Utilities	_____ [60]	_____ [61]	_____
Other expenses, such as: Supplies & Security system	_____ [63]	_____ [64]	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Excess casualty losses	_____	_____ [66]	_____
Carryovers:			
Operating expenses	_____	_____ [67]	_____
Casualty losses	_____	_____ [68]	_____
Depreciation	_____	_____ [70]	_____
Business expenses not from business use of home, such as:			
Travel, Supplies, Business telephone expenses	_____	_____ [71]	_____
Depreciation	_____	_____ [75]	_____

**NOTES/QUESTIONS:**

**If you used your automobile for business purposes, please complete the following information.**

**Preparer use only**

Description of business or profession \_\_\_\_\_ [3]

**Vehicles**

Vehicle 1 -	Date placed in service	_____	[4]
	Description	_____	[5]
	Comments	_____	
Vehicle 2 -	Date placed in service	_____	[9]
	Description	_____	[10]
	Comments	_____	
Vehicle 3 -	Date placed in service	_____	[14]
	Description	_____	[15]
	Comments	_____	
Vehicle 4 -	Date placed in service	_____	[19]
	Description	_____	[20]
	Comments	_____	

**Vehicle Questions**

	<b>Vehicle 1</b>	<b>Prior Year</b>	<b>Vehicle 2</b>	<b>Prior Year</b>	<b>Vehicle 3</b>	<b>Prior Year</b>	<b>Vehicle 4</b>	<b>Prior Year</b>
--	------------------	-------------------	------------------	-------------------	------------------	-------------------	------------------	-------------------

If you used your automobile for work purposes, answer the following questions:

Was the vehicle available for off-duty personal use? (Y, N)	___ [60]	<input type="text"/>	___ [62]	<input type="text"/>	___ [64]	<input type="text"/>	___ [66]	<input type="text"/>
Was another vehicle available for personal use? (Y, N)	___ [68]	<input type="text"/>	___ [70]	<input type="text"/>	___ [72]	<input type="text"/>	___ [74]	<input type="text"/>
Do you have evidence to support your deduction? (Y, N)	___ [76]	<input type="text"/>	___ [78]	<input type="text"/>	___ [80]	<input type="text"/>	___ [82]	<input type="text"/>
Is this evidence written? (Y, N)	___ [84]	<input type="text"/>	___ [86]	<input type="text"/>	___ [88]	<input type="text"/>	___ [90]	<input type="text"/>

**Vehicle Expenses**

	<b>Vehicle 1</b>	<b>Prior Year Information</b>	<b>Vehicle 2</b>	<b>Prior Year Information</b>	<b>Vehicle 3</b>	<b>Prior Year Information</b>	<b>Vehicle 4</b>	<b>Prior Year Information</b>
Total miles for year	_____ [32]	<input type="text"/>	_____ [34]	<input type="text"/>	_____ [36]	<input type="text"/>	_____ [38]	<input type="text"/>
Commuting miles	_____ [40]	<input type="text"/>	_____ [42]	<input type="text"/>	_____ [44]	<input type="text"/>	_____ [46]	<input type="text"/>
Business miles	_____ [48]	<input type="text"/>	_____ [50]	<input type="text"/>	_____ [52]	<input type="text"/>	_____ [54]	<input type="text"/>
Parking fees	_____ [92]	<input type="text"/>	_____ [94]	<input type="text"/>	_____ [96]	<input type="text"/>	_____ [98]	<input type="text"/>
Tolls	_____ [100]	<input type="text"/>	_____ [102]	<input type="text"/>	_____ [104]	<input type="text"/>	_____ [106]	<input type="text"/>
Gasoline	_____ [108]	<input type="text"/>	_____ [110]	<input type="text"/>	_____ [112]	<input type="text"/>	_____ [114]	<input type="text"/>
Oil	_____ [116]	<input type="text"/>	_____ [118]	<input type="text"/>	_____ [120]	<input type="text"/>	_____ [122]	<input type="text"/>
Repairs	_____ [124]	<input type="text"/>	_____ [126]	<input type="text"/>	_____ [128]	<input type="text"/>	_____ [130]	<input type="text"/>
Maintenance	_____ [132]	<input type="text"/>	_____ [134]	<input type="text"/>	_____ [136]	<input type="text"/>	_____ [138]	<input type="text"/>
Tires	_____ [140]	<input type="text"/>	_____ [142]	<input type="text"/>	_____ [144]	<input type="text"/>	_____ [146]	<input type="text"/>
Car washes	_____ [148]	<input type="text"/>	_____ [150]	<input type="text"/>	_____ [152]	<input type="text"/>	_____ [154]	<input type="text"/>
Insurance	_____ [156]	<input type="text"/>	_____ [158]	<input type="text"/>	_____ [160]	<input type="text"/>	_____ [162]	<input type="text"/>
Interest	_____ [164]	<input type="text"/>	_____ [166]	<input type="text"/>	_____ [168]	<input type="text"/>	_____ [170]	<input type="text"/>
Registration	_____ [172]	<input type="text"/>	_____ [174]	<input type="text"/>	_____ [176]	<input type="text"/>	_____ [178]	<input type="text"/>
Licenses	_____ [180]	<input type="text"/>	_____ [182]	<input type="text"/>	_____ [184]	<input type="text"/>	_____ [186]	<input type="text"/>
Property taxes	_____ [188]	<input type="text"/>	_____ [190]	<input type="text"/>	_____ [192]	<input type="text"/>	_____ [194]	<input type="text"/>
Other vehicle expenses	_____ [196]	<input type="text"/>	_____ [198]	<input type="text"/>	_____ [200]	<input type="text"/>	_____ [202]	<input type="text"/>
Vehicle rentals	_____ [204]	<input type="text"/>	_____ [206]	<input type="text"/>	_____ [208]	<input type="text"/>	_____ [210]	<input type="text"/>
Inclusion amt (Preparer only)	_____ [212]	<input type="text"/>	_____ [214]	<input type="text"/>	_____ [216]	<input type="text"/>	_____ [218]	<input type="text"/>
Depreciation	_____ [220]	<input type="text"/>	_____ [222]	<input type="text"/>	_____ [224]	<input type="text"/>	_____ [226]	<input type="text"/>

	2023 Information		Prior Year Information
	Taxpayer	Spouse	
Self-employed health insurance premiums: (Not entered elsewhere)			
_____	_____ [2]	_____ [3]	
_____	_____	_____	
_____	_____	_____	
Self-employed long-term care premiums: (Not entered elsewhere)			
_____	_____ [5]	_____ [6]	
_____	_____	_____	
_____	_____	_____	

**NOTES/QUESTIONS:**

Please provide all Forms 1095-A

Taxpayer/Spouse (T,S) \_\_\_\_\_ [1]  
 Marketplace identifier (Box 1) \_\_\_\_\_ [6]  
 Marketplace-assigned policy number (Box 2) \_\_\_\_\_ [7]  
 Policy issuer's name (Box 3) \_\_\_\_\_ [2]

Part III Household Information -

	A. 2023 Monthly Premium Amount	Prior Year Information	B. 2023 Monthly Premium Amount of Second Lowest Cost Silver Plan (SLCSP)	C. 2023 Monthly Advance Payment of Premium Tax Credit	Prior Year Information
January	_____ [12]	_____	_____ [25]	_____ [38]	_____
February	_____ [13]	_____	_____ [26]	_____ [39]	_____
March	_____ [14]	_____	_____ [27]	_____ [40]	_____
April	_____ [15]	_____	_____ [28]	_____ [41]	_____
May	_____ [16]	_____	_____ [29]	_____ [42]	_____
June	_____ [17]	_____	_____ [30]	_____ [43]	_____
July	_____ [18]	_____	_____ [31]	_____ [44]	_____
August	_____ [19]	_____	_____ [32]	_____ [45]	_____
September	_____ [20]	_____	_____ [33]	_____ [46]	_____
October	_____ [21]	_____	_____ [34]	_____ [47]	_____
November	_____ [22]	_____	_____ [35]	_____ [48]	_____
December	_____ [23]	_____	_____ [36]	_____ [49]	_____
Annual total	_____ [24]	_____	_____ [37]	_____ [50]	_____

Control Totals

ACA - Health Insurance Marketplace Statement #2

Please provide all Forms 1095-A

Taxpayer/Spouse (T,S) \_\_\_\_\_ [1]  
 Marketplace identifier (Box 1) \_\_\_\_\_ [6]  
 Marketplace-assigned policy number (Box 2) \_\_\_\_\_ [7]  
 Policy issuer's name (Box 3) \_\_\_\_\_ [2]

Part III Household Information -

	A. 2023 Monthly Premium Amount	Prior Year Information	B. 2023 Monthly Premium Amount of Second Lowest Cost Silver Plan (SLCSP)	C. 2023 Monthly Advance Payment of Premium Tax Credit	Prior Year Information
January	_____ [12]	_____	_____ [25]	_____ [38]	_____
February	_____ [13]	_____	_____ [26]	_____ [39]	_____
March	_____ [14]	_____	_____ [27]	_____ [40]	_____
April	_____ [15]	_____	_____ [28]	_____ [41]	_____
May	_____ [16]	_____	_____ [29]	_____ [42]	_____
June	_____ [17]	_____	_____ [30]	_____ [43]	_____
July	_____ [18]	_____	_____ [31]	_____ [44]	_____
August	_____ [19]	_____	_____ [32]	_____ [45]	_____
September	_____ [20]	_____	_____ [33]	_____ [46]	_____
October	_____ [21]	_____	_____ [34]	_____ [47]	_____
November	_____ [22]	_____	_____ [35]	_____ [48]	_____
December	_____ [23]	_____	_____ [36]	_____ [49]	_____
Annual total	_____ [24]	_____	_____ [37]	_____ [50]	_____

Control Totals

NOTES/QUESTIONS:

Please provide all Forms 5498-SA.

	<b>2023 Information</b>	<b>Prior Year Information</b>
Taxpayer/Spouse (T, S)	____ [1]	
Name of Trustee _____	____ [4]	
State postal code _____	____ [2]	
Indicate type of health or medical savings account:		
HSA	____ [6]	
Archer MSA	____ [7]	
MA (Medicare Advantage) MSA	____ [9]	
Total HSA/MSA contributions made		
for 2023 (Enter all amounts contributed, including through employer cafeteria plans) _____	____ [10]	
Indicate type of coverage under qualifying high deductible health plan (1 = Self-Only, 2 = Family)	____ [12]	
Number of months in qualified high deductible health plan in 2023	____ [13]	
Mark if you want to contribute the maximum allowable health or medical savings account contribution amount	____ [14]	
Total HSA/MSA contribution to be made for 2023	____ [15]	
Fair market value of HSA, Archer MSA, or MA MSA (Form 5498-SA, Box 5)	____ [16]	
Excess contributions for 2022 taken as constructive contributions for 2023	____ [19]	
Rollover contribution (Form 5498-SA, Box 4)	____ [21]	

**Complete this section if your account is an Archer MSA or MA MSA**

Amount of annual deductible	____ [24]	
Enter compensation from employer maintaining high deductible health plan	____ [27]	
If self-employed, enter earned income from business under which plan was established	____ [31]	

**Complete this section if your account is an HSA**

Was the high deductible health plan in effect for December 2023? (Y, N) \_\_\_\_\_ [33]

**NOTES/QUESTIONS:**

Health, Medical Savings Account Distributions

Please provide all Forms 1099-SA.

2023 Information

Prior Year Information

Taxpayer/Spouse (T, S) [1]
Name of Trustee [4]
State postal code [2]
Gross distributions received (Box 1) [7]
Earnings on excess contributions (Box 2) [9]
Distribution code (Box 3) [11]
Fair Market Value on date of death (Box 4) [12]
Box 5 -
HSA [13]
Archer MSA [14]
MA MSA [15]
All distributions were used to pay unreimbursed qualified medical expenses [17]
If some distributions were used to pay for other than qualified medical expenses, enter the unreimbursed qualified medical expenses for 2023 [19]
Withdrawal of excess contributions by the due date of the return [21]
Amount of distribution rolled over for 2023 [23]
If the distribution is due to the death of the account holder, enter the qualified decedent medical expenses paid by the taxpayer [26]
If MA (Medicare Advantage) MSA, enter value of account on 12/31/22 [27]
For HSA accounts:
Was the high deductible health plan coverage started in 2022 and in effect for the month of December 2022? (Y, N) [29]
Was the high deductible health plan coverage ended before 12/31/23? (Y, N) [30]

Large empty rectangular box for Prior Year Information.

Long Term Care (LTC) Service and Contracts

Please provide all Forms 1099-LTC.

2023 Information

Prior Year Information

Name of the insured chronically ill individual [39]
Social security number of insured [40]
Gross long-term care (LTC) benefits paid (Box 1) [42]
Accelerated death benefits paid (Box 2) [44]
Check one (Box 3)
Per diem [46]
Reimbursed amount [47]
Qualified contract (Box 4) [48]
Check, if applicable (Box 5)
Chronically ill [49]
Terminally ill [50]
Are there other individuals who received LTC payments during 2023? (Y, N) [52]
If the insured is terminally ill, were payments received on account of terminal illness? (Y, N) [53]
Number of days during the long-term care period [54]
Cost incurred for qualified long-term care services during the long-term care period [55]

Large empty rectangular box for Prior Year Information.

NOTES/QUESTIONS:



Please provide all Forms 1099-QA and 5498-QA

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Payer name \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [4]  
 Recipient's Social Security Number \_\_\_\_\_ [7]  
 Recipient's Name \_\_\_\_\_ [8] \_\_\_\_\_ [9]  
 Gross distribution (Form 1099-QA Box 1) \_\_\_\_\_ [10]  
 Earnings (Form 1099-QA Box 2) \_\_\_\_\_ [12]  
 Basis (Form 1099-QA Box 3) \_\_\_\_\_ [14]  
 Program-to-program transfer (Form 1099-QA Box 4) \_\_\_\_\_ [16]  
 Check if ABLE account terminated in 2023 (Form 1099-QA Box 5) \_\_\_\_\_ [17]  
 Check if the recipient is not the designated beneficiary (Form 1099-QA Box 6) \_\_\_\_\_ [18]  
 Qualified disability expenses \_\_\_\_\_ [19]  
 Amount of rollover \_\_\_\_\_ [21]  
 Amount contributed in 2023 (Form 5498-QA Box 1) \_\_\_\_\_ [23]  
 Value of account on 12/31/23 (Form 5498-QA Box 4) \_\_\_\_\_ [25]


**Control Totals**

**ABLE Account Information #2**

Please provide all Forms 1099-QA and 5498-QA

**2023 Information**

**Prior Year Information**

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Payer name \_\_\_\_\_ [3]  
 State postal code \_\_\_\_\_ [4]  
 Recipient's Social Security Number \_\_\_\_\_ [7]  
 Recipient's Name \_\_\_\_\_ [8] \_\_\_\_\_ [9]  
 Gross distribution (Form 1099-QA Box 1) \_\_\_\_\_ [10]  
 Earnings (Form 1099-QA Box 2) \_\_\_\_\_ [12]  
 Basis (Form 1099-QA Box 3) \_\_\_\_\_ [14]  
 Program-to-program transfer (Form 1099-QA Box 4) \_\_\_\_\_ [16]  
 Check if ABLE account terminated in 2023 (Form 1099-QA Box 5) \_\_\_\_\_ [17]  
 Check if the recipient is not the designated beneficiary (Form 1099-QA Box 6) \_\_\_\_\_ [18]  
 Qualified disability expenses \_\_\_\_\_ [19]  
 Amount of rollover \_\_\_\_\_ [21]  
 Amount contributed in 2023 (Form 5498-QA Box 1) \_\_\_\_\_ [23]  
 Value of account on 12/31/23 (Form 5498-QA Box 4) \_\_\_\_\_ [25]


**Control Totals**

**NOTES/QUESTIONS:**

### Social Security Tax on Unreported Tips

Complete if you received cash/charge tips of \$20 or less in a month in 2023.

#### 2023 Information

#### Prior Year Information

Taxpayer

Spouse

Total cash and charge tips under \$20 per month and not reported to employer

\_\_\_\_\_ [3]

\_\_\_\_\_ [4]

Complete if you received cash/charge tips of \$20 or more in a month and did not report all of those tips to your employer.

	Employer name	Employer identification number	Total tips received in 2023	Total tips reported in 2023
Taxpayer information [1]	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
Spouse information [2]	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

### Social Security Tax on Unreported Wages

Complete if you received pay from a firm for services performed not as an independent contractor and social security and Medicare taxes were not withheld from the pay.

(\*\*Please refer to Reason Codes located at the bottom)

	Firm name	Firm's federal identification number	Reason Code **	Date of IRS determination or 1099-MISC correspondence received	Mark if 1099-MISC received or 1099-NEC with no social security or Medicare tax withheld	Total wages received
Taxpayer information [6]	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____
Spouse information [7]	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____
	_____	_____	—	_____	—	_____

#### \*\* Reason Codes

- A = I filed Form SS-8 and received a determination letter stating that I am an employee of this firm.
- C = I received other correspondence from the IRS that states I am an employee.
- G = I filed Form SS-8 with the IRS and have not received a reply.
- H = I received a Form W-2 and a Form 1099-MISC from this firm for 2023. The amount on Form 1099-MISC should have been included as wages on Form W-2.

State postal code **Taxpayer** \_\_\_\_\_[1] **Spouse** \_\_\_\_\_[2]

	<b>Taxpayer</b>	<b>Spouse</b>	<b>Prior Year Information</b>
If you received a parsonage provided by the church, please complete the following information:			
Fair rental value of parsonage provided by church	_____ [5]	_____ [6]	_____
Actual parsonage utilities expense	_____ [11]	_____ [12]	_____
If you received a rental or parsonage allowance provided by the church, please complete the following information:			
Utilities allowance, if separate from parsonage allowance	_____ [17]	_____ [18]	_____
Actual parsonage expense	_____ [20]	_____ [21]	_____
Fair rental value of home	_____ [23]	_____ [24]	_____
Actual utilities expense	_____ [26]	_____ [27]	_____
Mark if you have claimed exemption from self-employment tax by filing Form 4361 with the IRS			
	_____ [29]	_____ [30]	_____
If you are a self-employed minister, enter any tax-deductible contributions to a 403(b) retirement plan			
	_____ [33]	_____ [34]	_____
Unreimbursed Business Expenses - net reimbursed and after 50% Meals & Entertainment reduction:			
_____	_____ [36]	_____ [37]	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**NOTES/QUESTIONS:**

Enter parent's information for children under age 19 on 1/1/24 or a full-time student under age 24 with unearned income of more than \$2500

Parent's social security number (Enter the name and social security number of the parent listed first on the return) \_\_\_\_\_ [1]

Parent's first name \_\_\_\_\_ [2]

Parent's last name \_\_\_\_\_ [3]

Parent's filing status (1 = Single, 2 = Married/filing jointly, 3 = Married separately, 4 = Head of household, 5 = Qualifying widow(er)) \_\_\_\_\_ [4]

### All Other Children's Information

Enter information for each child with unearned income of more than \$2500.

Preparer - Enter on Screen 8615Sib

Child #1 social security number \_\_\_\_\_ [1] Child #2 social security number \_\_\_\_\_ [1]

Child #1 first name \_\_\_\_\_ [2] Child #2 first name \_\_\_\_\_ [2]

Child #1 last name \_\_\_\_\_ [3] Child #2 last name \_\_\_\_\_ [3]

Child #1 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #2 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

Child #3 social security number \_\_\_\_\_ [1] Child #4 social security number \_\_\_\_\_ [1]

Child #3 first name \_\_\_\_\_ [2] Child #4 first name \_\_\_\_\_ [2]

Child #3 last name \_\_\_\_\_ [3] Child #4 last name \_\_\_\_\_ [3]

Child #3 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #4 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

Child #5 social security number \_\_\_\_\_ [1] Child #6 social security number \_\_\_\_\_ [1]

Child #5 first name \_\_\_\_\_ [2] Child #6 first name \_\_\_\_\_ [2]

Child #5 last name \_\_\_\_\_ [3] Child #6 last name \_\_\_\_\_ [3]

Child #5 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #6 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

Child #7 social security number \_\_\_\_\_ [1] Child #8 social security number \_\_\_\_\_ [1]

Child #7 first name \_\_\_\_\_ [2] Child #8 first name \_\_\_\_\_ [2]

Child #7 last name \_\_\_\_\_ [3] Child #8 last name \_\_\_\_\_ [3]

Child #7 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #8 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

Child #9 social security number \_\_\_\_\_ [1] Child #10 social security number \_\_\_\_\_ [1]

Child #9 first name \_\_\_\_\_ [2] Child #10 first name \_\_\_\_\_ [2]

Child #9 last name \_\_\_\_\_ [3] Child #10 last name \_\_\_\_\_ [3]

Child #9 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #10 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

Child #11 social security number \_\_\_\_\_ [1] Child #12 social security number \_\_\_\_\_ [1]

Child #11 first name \_\_\_\_\_ [2] Child #12 first name \_\_\_\_\_ [2]

Child #11 last name \_\_\_\_\_ [3] Child #12 last name \_\_\_\_\_ [3]

Child #11 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4] Child #12 date of birth (mm/dd/yyyy) \_\_\_\_\_ [4]

### NOTES/QUESTIONS:

### Children's Interest Income

Please provide copies of all Form 1099-INT or other statements reporting child's interest income.  
 \*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.  
 Complete a separate Organizer Form ID: 8814 for each child.

Child's social security number \_\_\_\_\_ [1]  
 Child's date of birth \_\_\_\_\_ [2]  
 Child's name \_\_\_\_\_ [4]  
 Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_\_ [5]

Type Code (**See codes below)	Payer	Interest [6] Income	Tax Exempt Income	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Prior Year Information

<b>**Interest Codes</b>
Blank = Regular Interest   3 = Nominee Distribution   4 = Accrued Interest   5 = OID Adjustment   6 = ABP Adjustment

### Children's Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting child's dividend income.

Type Code (** See codes below)	Ordinary <sup>[8]</sup> Dividends	Qualified Dividends	Total Capital Gain Distributions	Section 1250	Section 199A	28% Capital Gain	Tax Exempt Dividends	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Prior Year Information
<b>1</b>	Payer									
	Amounts									
<b>2</b>	Payer									
	Amounts									
<b>3</b>	Payer									
	Amounts									
<b>4</b>	Payer									
	Amounts									
<b>5</b>	Payer									
	Amounts									
<b>6</b>	Payer									
	Amounts									

<b>**Dividend Codes</b>
Blank = Other                      3 = Nominee

Alaska Permanent Fund dividends:	2023 Information <sup>[10]</sup>	Prior Year Information

Complete if you paid cash wages of \$1,000 or more to any household employee.

Taxpayer/Spouse (T, S) \_\_\_\_\_ [1]  
 Employer identification number \_\_\_\_\_ [2]

Total cash wages subject to social security taxes \_\_\_\_\_ [4]  
 Total cash wages subject to Medicare taxes \_\_\_\_\_ [5]  
 Total cash wages subject to Additional Medicare Tax withholding \_\_\_\_\_ [6]  
 Federal income tax withheld \_\_\_\_\_ [7]  
 State disability plan social security & Medicare withheld \_\_\_\_\_ [8]

Did you:  
 (A) pay any household employee cash wages of \$2,600 or more in 2023? (Y, N) \_\_\_\_\_ [9]  
 (B) withhold Federal income tax for any household employee? (Y, N) \_\_\_\_\_ [10]  
 (C) pay household employees cash wages equal to or greater than \$1,000 in any quarter of 2022 or 2023? (Y, N) \_\_\_\_\_ [11]

### Federal Unemployment (FUTA) Tax

If you answered "Yes" to question (C) above, complete the following information.  
 Complete only items marked with an asterisk (\*) if total cash wages subject to FUTA tax amount is also taxable  
 as defined by your State act and unemployment contributions are paid to only one State.

Total cash wages subject to FUTA tax \_\_\_\_\_ [12]

State #1 information  
 State postal code where you have to pay unemployment contributions \* \_\_\_\_\_ [14]  
 State reporting number as shown on state unemployment tax return \_\_\_\_\_ [15]  
 Taxable wages (as defined in state act) \_\_\_\_\_ [16]  
 State experience rate period:  
 From \_\_\_\_\_ [17]  
 To \_\_\_\_\_ [18]  
 State experience rate (xxx.xx) \_\_\_\_\_ [19]  
 Contributions paid to state unemployment fund \* \_\_\_\_\_ [20]  
 Contributions for 2023 paid after 04/15/24 \_\_\_\_\_ [21]

State #2 information  
 State postal code where you have to pay unemployment contributions \_\_\_\_\_ [22]  
 State reporting number as shown on state unemployment tax return \_\_\_\_\_ [23]  
 Taxable wages (as defined in state act) \_\_\_\_\_ [24]  
 State experience rate period:  
 From \_\_\_\_\_ [25]  
 To \_\_\_\_\_ [26]  
 State experience rate (xxx.xx) \_\_\_\_\_ [27]  
 Contributions paid to state unemployment fund \_\_\_\_\_ [28]  
 Contributions for 2023 paid after 04/15/24 \_\_\_\_\_ [29]

### NOTES/QUESTIONS:

**You are required to repay the First-Time Homebuyer credit if you claimed the credit in 2008. If the credit was claimed in 2009, 2010, or 2011, you do not have to repay the credit.**

Principal residence address, if different from home address on Organizer Form ID: 1040

Address \_\_\_\_\_ [1]

City/State/Zip code \_\_\_\_\_ [2] \_\_\_\_ [3] \_\_\_\_\_ [4]

Date home acquired (After 4/8/08 and before 5/1/10) (For service members after 12/31/08 and before 5/1/11) \_\_\_\_\_ [5]

Purchase price of the home \_\_\_\_\_ [6]

Date the home was sold or ceased being used as principal residence \_\_\_\_\_ [13]

If you sold your home, enter the selling price \_\_\_\_\_ [14]

If you sold your home, enter the expense of sale \_\_\_\_\_ [15]

Were you and your spouse married on the purchase date? (Y, N) \_\_\_\_\_ [18]

If your home was transferred to your ex-spouse due to a divorce settlement,  
enter his or her full name \_\_\_\_\_ [19]

If you own the principal residence with another person enter their name and allocation percentage

Other owner name \_\_\_\_\_ [22]

Allocation percentage \_\_\_\_\_

---

**NOTES/QUESTIONS:**

### Child and Dependent Care Expenses

Please enter all amounts paid in 2023 for the care of one or more dependents which enables you to work or attend school. Enter the amount of dependent care expenses paid for each qualifying dependent on Organizer Form ID:1040

	Taxpayer	Spouse
2022 employer-provided dependent care benefits used during 2023 grace period	_____ [3]	_____ [4]
Employer-provided dependent care benefits that were forfeited in 2023	_____ [5]	_____ [6]
Total qualified expenses incurred in 2023	_____ [9]	_____ [9]
Were you or your spouse a full time student or disabled? (Yes or No)	_____ [10]	_____ [11]
Did you provide care expenses for any person(s) who is not listed as a dependent? (Y, N)	_____ [12]	_____ [12]

Business name of provider \_\_\_\_\_

First and last name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt / LAFCP / Due Diligence (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider, 3 = Provider moved and unable to get TIN, 4 = Provider refuses to give TIN) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_ [7]

Foreign province or state of provider \_\_\_\_\_

Foreign country and Foreign postal code of provider \_\_\_\_\_

Business name of provider \_\_\_\_\_

First and last name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt / LAFCP / Due Diligence (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider, 3 = Provider moved and unable to get TIN, 4 = Provider refuses to give TIN) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_

Foreign province or state of provider \_\_\_\_\_

Foreign country and Foreign postal code of provider \_\_\_\_\_

Business name of provider \_\_\_\_\_

First and last name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt / LAFCP / Due Diligence (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider, 3 = Provider moved and unable to get TIN, 4 = Provider refuses to give TIN) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_

Foreign province or state of provider \_\_\_\_\_

Foreign country and Foreign postal code of provider \_\_\_\_\_

Business name of provider \_\_\_\_\_

First and last name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt / LAFCP / Due Diligence (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider, 3 = Provider moved and unable to get TIN, 4 = Provider refuses to give TIN) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_

Foreign province or state of provider \_\_\_\_\_

Foreign country and Foreign postal code of provider \_\_\_\_\_

Business name of provider \_\_\_\_\_

First and last name of provider \_\_\_\_\_

Street address of provider \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt / LAFCP / Due Diligence (1 = Tax Exempt, 2 = Living Abroad Foreign Care Provider, 3 = Provider moved and unable to get TIN, 4 = Provider refuses to give TIN) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_

Foreign province or state of provider \_\_\_\_\_

Foreign country and Foreign postal code of provider \_\_\_\_\_

**Control Totals**



### Credit For The Elderly or Disabled

Please complete if you were age 65 or older at the end of 2023, OR you were under age 65 and retired under total and permanent disability, and you received taxable disability income.

Taxpayer

Spouse

Nontaxable disability/pension income received in 2023

[7]

[8]

Taxable disability income received in 2023

[9]

[10]

---

**NOTES/QUESTIONS:**

The Inflation Reduction Act of 2022 provides credits for clean energy and energy efficient improvements made to personal residences.

Taxpayer/Spouse/Joint (T, S, J)	_____	[1]
Enter the total amount of costs for qualified solar electric property	_____	[3]
Enter the total amount of costs for qualified solar water heating property	_____	[4]
Enter the total amount of costs for qualified small wind energy property	_____	[5]
Enter the total amount of costs for qualified geothermal heat pump property	_____	[6]
Enter the total amount of costs for qualified battery technology costs with capacity of at least 3 kilowatt hours	_____	[7]
Were the costs incurred made to your main home located in the United States? (Y, N)	_____	[8]
Enter the total amount of costs for qualified fuel cell property	_____	[9]
Enter the total amount of kilowatt capacity of the qualified fuel cell property	_____	[10]
Were the costs incurred related to the construction of your main home located in the United States? (Y, N)	_____	[16]
Enter the total amount of costs for insulation material or system to reduce heat loss or gain	_____	[17]
Enter the total amount of costs for the most expensive exterior door bought	_____	[18]
Enter the total amount of costs for all other exterior doors bought	_____	[19]
Enter the total amount of costs for exterior windows and skylights	_____	[20]
Enter the total amount of costs for central air conditioner	_____	[22]
Enter the total amount of costs for natural gas, propane or oil hot water heaters	_____	[23]
Enter the total amount of costs for qualified natural gas, propane, or oil furnace or hot water boilers	_____	[24]
Enter the total amount of costs for panelboards, subpanelboards, branch circuits or feeders	_____	[25]
Enter the total amount of costs for qualified home energy audit costs	_____	[26]
Enter the total amount of costs for electric or natural gas heat pumps	_____	[27]
Enter the total amount of costs for electric or natural gas heat pump water heaters	_____	[28]
Enter the total amount of costs for biomass stoves and biomass boilers	_____	[29]

---

**NOTES/QUESTIONS:**

Complete if you paid or accrued foreign taxes to a foreign country or U.S. possession in 2023.

Preparer use only

Description \_\_\_\_\_ [3]  
 Taxpayer/Spouse (T, S) \_\_\_\_\_ [9]  
 Category of income\* \_\_\_\_\_ [11]  
 Description of income \_\_\_\_\_ [12]

*Category of Income	
A = Section 951A income	E = Section 901(j) income
B = Foreign Branch income	F = Certain income re-sourced by treaty
C = Passive income	G = Lump-sum distributions
D = General income	

**Foreign Income or Loss**

Country code \_\_\_\_\_ [20]  
 Country name \_\_\_\_\_ [21]

	Regular	AMT, if different
Foreign gross income	_____ [24]	_____ [25]
Definitely related expenses:		
_____	_____ [32]	_____ [33]
_____	_____	_____
_____	_____	_____
Foreign source losses	_____ [46]	_____ [47]

**Foreign Taxes Paid or Accrued**

Foreign taxes paid or accrued:  
 Date paid or accrued \_\_\_\_\_ [48]  
 In foreign currency - taxes withheld on:  
 Dividends \_\_\_\_\_ [49]  
 Rents & royalties \_\_\_\_\_ [50]  
 Interest \_\_\_\_\_ [51]  
 Other foreign taxes \_\_\_\_\_ [52]  
 In US dollars - taxes withheld on:  
 Dividends \_\_\_\_\_ [54]  
 Rents & Royalties \_\_\_\_\_ [55]  
 Interest \_\_\_\_\_ [56]  
 Other foreign taxes \_\_\_\_\_ [57]

**NOTES/QUESTIONS:**

**Complete this form if you paid qualified adoption expenses in 2023. Indicate if the adoption was final in or before 2023. Qualified adoption expenses include adoption fees, attorney fees, court costs, and travel expenses while away from home. Please provide copies of legal documents approving the adoption.**

	<b>Child 1 [1]</b>	<b>Child 2</b>	<b>Child 3</b>
Taxpayer/Spouse/Joint (T, S, J)	_____	_____	_____
First name	_____	_____	_____
Last name	_____	_____	_____
Child's date of birth	_____	_____	_____
Mark if this child was:			
born before '06 and was disabled	_____	_____	_____
a child with special needs	_____	_____	_____
a foreign child	_____	_____	_____
Child's identifying number	_____	_____	_____
Total adoption credit received in prior years for this child	_____	_____	_____
Total qualified adoption expenses paid in 2022 for this child	_____	_____	_____
Employer-provided benefits received in 2022 for this child	_____	_____	_____
Total qualified adoption expenses paid in 2023 for this child	_____	_____	_____
Employer-provided benefits received in 2023 for this child	_____	_____	_____
Adoption final in (1 = '23, 2 = Pre '23)	_____	_____	_____

	<b>Child 4</b>	<b>Child 5</b>	<b>Child 6</b>
Taxpayer/Spouse/Joint (T, S, J)	_____	_____	_____
First name	_____	_____	_____
Last name	_____	_____	_____
Child's date of birth	_____	_____	_____
Mark if this child was:			
born before '06 and was disabled	_____	_____	_____
a child with special needs	_____	_____	_____
a foreign child	_____	_____	_____
Child's identifying number	_____	_____	_____
Total adoption credit received in prior years for this child	_____	_____	_____
Total qualified adoption expenses paid in 2022 for this child	_____	_____	_____
Employer-provided benefits received in 2022 for this child	_____	_____	_____
Total qualified adoption expenses paid in 2023 for this child	_____	_____	_____
Employer-provided benefits received in 2023 for this child	_____	_____	_____
Adoption final in (1 = '23, 2 = Pre '23)	_____	_____	_____

If the adoption was incomplete or unsuccessful please provide information below:

\_\_\_\_\_ [9]  
 \_\_\_\_\_ [10]  
 \_\_\_\_\_ [11]

**NOTES/QUESTIONS:**

**\*Select the Type of Use codes from the chart below**

	Type of Use*	Rate	Gallons
<b>Nontaxable use of gasoline -</b>			
Off-highway business use		\$0.183	_____ [1]
Use on a farm		0.183	_____ [2]
Other nontaxable use	____ [3]	0.183	_____ [4]
Exported		0.184	_____ [5]
<b>Nontaxable use of aviation gasoline -</b>			
Commercial aviation		0.15	_____ [6]
Other nontaxable use	____ [7]	0.193	_____ [8]
Exported		0.194	_____ [9]
Leaking underground storage tank (LUST) tax		0.001	_____ [10]
<b>Nontaxable use of undyed diesel fuel -</b>			
Explanation of evidence of dyes:			_____ [11]
_____			_____
_____			_____
Other nontaxable use	____ [12]	0.243	_____ [13]
Use on a farm		0.243	_____ [14]
Trains		0.243	_____ [15]
Intercity / local bus		0.17	_____ [16]
Exported		0.244	_____ [17]
<b>Nontaxable use of undyed kerosene (other than aviation) -</b>			
Explanation of evidence of dyes:			_____ [18]
_____			_____
_____			_____
Other nontaxable use	____ [19]	0.243	_____ [20]
Use on a farm		0.243	_____ [21]
Intercity / local buses		0.17	_____ [22]
Exported		0.244	_____ [23]
Other nontaxable use taxed at \$.044	____ [24]	0.043	_____ [25]
Other nontaxable use taxed at \$.219	____ [26]	0.218	_____ [27]
<b>Kerosene used in aviation -</b>			
Kerosene taxed at \$.244		0.200	_____ [28]
Kerosene taxed at \$.219		0.175	_____ [29]
Other nontaxable use taxed at \$.244	____ [30]	0.243	_____ [31]
Other nontaxable use taxed at \$.219/.044	____ [32]	0.218	_____ [33]
Leaking underground storage tank (LUST) tax		0.001	_____ [34]

*Type of Use	
<b>1 = Farming purposes</b>	<b>8 = Diesel &amp; Kerosene fuel other than train or highway vehicle</b>
<b>2 = Off highway business use</b>	<b>9 = Foreign trade</b>
<b>3 = Export</b>	<b>10 = Certain helicopter and fixed wing air ambulance uses</b>
<b>4 = Commercial fishing</b>	<b>11 = Aviation fuel other than propulsion engines</b>
<b>5 = Intercity/local bus</b>	<b>13 = Exclusive use by a nonprofit educational organization</b>
<b>6 = In a qualified local bus</b>	<b>14 = Exclusive use by a state, political subdivision or DC</b>
<b>7 = School bus</b>	<b>15 = In an aircraft or vehicle owned by an aircraft museum</b>

**NOTES/QUESTIONS:**

**\*Select the Type of Use codes from the chart below**

Type of Use*	Rate	Gallons
<b>Sales by registered ultimate vendors of undyed diesel fuel -</b>		
Registration Number		_____ [1]
Explanation of evidence of dyes:		_____ [2]
_____ [3]		_____ [3]
State / local government	0.243	_____ [3]
Intercity / local buses	0.17	_____ [4]
<b>Sales by registered ultimate vendors of undyed kerosene -</b>		
Registration Number		_____ [5]
Explanation of evidence of dyes:		_____ [6]
_____ [7]		_____ [7]
Use by state/local government	0.243	_____ [7]
Sales from a blocked pump	0.243	_____ [8]
Intercity / local buses	0.17	_____ [9]
<b>Sales by registered ultimate vendors of kerosene in aviation -</b>		
Registration Number		_____ [10]
Commercial aviation taxed at \$.219 (Other than foreign trade)	0.175	_____ [11]
Commercial aviation taxed at \$.244 (Other than foreign trade)	0.200	_____ [12]
Nonexempt use in noncommercial aviation	0.025	_____ [13]
Other nontaxable uses taxed at \$.244 _____ [14]	0.243	_____ [15]
Other nontaxable uses taxed at \$.219/.044 _____ [16]	0.218	_____ [17]
Leaking underground storage tank (LUST) tax	0.001	_____ [18]

*Type of Use	
<b>1 = Farming purposes</b>	<b>8 = Diesel &amp; Kerosene fuel other than train or highway vehicle</b>
<b>2 = Off highway business use</b>	<b>9 = Foreign trade</b>
<b>3 = Export</b>	<b>10 = Certain helicopter and fixed wing air ambulance uses</b>
<b>4 = Commercial fishing</b>	<b>11 = Aviation fuel other than propulsion engines</b>
<b>5 = Intercity/local bus</b>	<b>13 = Exclusive use by a nonprofit educational organization</b>
<b>6 = In a qualified local bus</b>	<b>14 = Exclusive use by a state, political subdivision or DC</b>
<b>7 = School bus</b>	<b>15 = In an aircraft or vehicle owned by an aircraft museum</b>

**NOTES/QUESTIONS:**

**\*Select the Type of Use codes from the chart below**

	Type of Use*	Rate	Gallons
<b>Nontaxable use of alternative fuel -</b>			
Liquefied petroleum gas (LPG)	___ [1]	0.183	_____ [2]
"P Series" fuels	___ [3]	0.183	_____ [4]
Compressed natural gas (CNG)	___ [5]	0.183	_____ [6]
Liquefied hydrogen	___ [7]	0.183	_____ [8]
Any liquid fuel derived from coal through the Fischer-Tropsch process	___ [9]	0.243	_____ [10]
Liquid hydrocarbons derived from biomass	___ [11]	0.243	_____ [12]
Liquefied natural gas (LNG)	___ [13]	0.243	_____ [14]
Liquefied gas derived from biomass	___ [15]	0.183	_____ [16]
<b>Alternative fuel credit and alternative fuel mixture credit -</b>			
Registration Number			_____ [17]
Liquefied hydrogen		0.50	_____ [18]
<b>Registered credit card users -</b>			
Registration Number			_____ [19]
Diesel for state / local government		0.243	_____ [20]
Kerosene for state / local government		0.243	_____ [21]
Kerosene for aviation use by state / local gov't taxed at \$.219/.044		0.218	_____ [22]
<b>Nontaxable use of a diesel-water fuel emulsion -</b>			
Other nontaxable use	___ [23]	0.197	_____ [24]
Exported		0.198	_____ [25]
<b>Diesel-water fuel emulsion blending -</b>			
Registration Number			_____ [26]
Blender credit		0.046	_____ [27]
<b>Exported dyed fuels -</b>			
Exported dyed diesel fuel		0.001	_____ [28]
Exported dyed kerosene		0.001	_____ [29]

*Type of Use	
<p><b>1 = Farming purposes</b></p> <p><b>2 = Off highway business use</b></p> <p><b>3 = Export</b></p> <p><b>4 = Commercial fishing</b></p> <p><b>5 = Intercity/local bus</b></p> <p><b>6 = In a qualified local bus</b></p> <p><b>7 = School bus</b></p>	<p><b>8 = Diesel &amp; Kerosene fuel other than train or highway vehicle</b></p> <p><b>9 = Foreign trade</b></p> <p><b>10 = Certain helicopter and fixed wing air ambulance uses</b></p> <p><b>11 = Aviation fuel other than propulsion engines</b></p> <p><b>13 = Exclusive use by a nonprofit educational organization</b></p> <p><b>14 = Exclusive use by a state, political subdivision or DC</b></p> <p><b>15 = In an aircraft or vehicle owned by an aircraft museum</b></p>

**NOTES/QUESTIONS:**

## Qualified Business Income Deduction Carryover 2022 to 2023 Amounts

Qualified business loss (QBID) \_\_\_\_\_ [1]  
 Qualified REIT dividends and PTP loss \_\_\_\_\_ [2]  
 Excess business loss deduction portion of NOL \_\_\_\_\_ [3]

## Instructions

Enter carryovers from prior year(s) as positive numbers.  
 Enter utilizations from prior year(s) as negative numbers.

## Indefinite Carryovers

Minimum tax credit \_\_\_\_\_ [4]  
 Investment interest \_\_\_\_\_ [5]  
 Investment interest - AMT \_\_\_\_\_ [6]  
 Short-term capital loss \_\_\_\_\_ [7]  
 Short-term capital loss - AMT \_\_\_\_\_ [8]  
 Long-term capital loss \_\_\_\_\_ [9]  
 Long-term capital loss - AMT \_\_\_\_\_ [10]  
 Residential energy credit \_\_\_\_\_ [11]  
 D.C. first-time homebuyer credit \_\_\_\_\_ [12]  
 Tax credit bonds \_\_\_\_\_ [13]

## 2022 to 2023 Amounts

## Section 1231 Nonrecaptured Losses

	Section 1231 Nonrecaptured Losses	AMT Section 1231 Nonrecaptured Losses
2018	_____ [14]	_____ [19]
2019	_____ [15]	_____ [20]
2020	_____ [16]	_____ [21]
2021	_____ [17]	_____ [22]
2022	_____ [18]	_____ [23]

## Charitable Contribution Carryover Items

Prior C/O Year	100% Contributions	60% Contributions	50% Contributions	30% Contributions	50/30% Cap Gain Prop	20% Contributions
2018		_____ [29]	_____ [34]	_____ [39]	_____ [44]	_____ [49]
2019		_____ [30]	_____ [35]	_____ [40]	_____ [45]	_____ [50]
2020	_____ [26]	_____ [31]	_____ [36]	_____ [41]	_____ [46]	_____ [51]
2021	_____ [27]	_____ [32]	_____ [37]	_____ [42]	_____ [47]	_____ [52]
2022		_____ [33]	_____ [38]	_____ [43]	_____ [48]	_____ [53]

## AMT Charitable Contribution Carryover Items

Prior C/O Year	100% AMT Contributions	60% AMT Contributions	50% AMT Contributions	30% AMT Contributions	50/30% AMT Cap Gain Prop	20% AMT Contributions
2018		_____ [59]	_____ [64]	_____ [69]	_____ [74]	_____ [79]
2019		_____ [60]	_____ [65]	_____ [70]	_____ [75]	_____ [80]
2020	_____ [56]	_____ [61]	_____ [66]	_____ [71]	_____ [76]	_____ [81]
2021	_____ [57]	_____ [62]	_____ [67]	_____ [72]	_____ [77]	_____ [82]
2022		_____ [63]	_____ [68]	_____ [73]	_____ [78]	_____ [83]

## NOTES/QUESTIONS:



**Qualified Conservation Contribution Carryover Items**

Enter carryovers from prior year(s) as positive numbers. Enter utilizations from prior year(s) as negative numbers.

Prior C/O Year	50% Qualified Conservation Contributions	50% AMT Qual Conservation Contributions	100% Qualified Conservation Contributions	100% AMT Qual Conservation Contributions
2008	[1]	[16]	[31]	[46]
2009	[2]	[17]	[32]	[47]
2010	[3]	[18]	[33]	[48]
2011	[4]	[19]	[34]	[49]
2012	[5]	[20]	[35]	[50]
2013	[6]	[21]	[36]	[51]
2014	[7]	[22]	[37]	[52]
2015	[8]	[23]	[38]	[53]
2016	[9]	[24]	[39]	[54]
2017	[10]	[25]	[40]	[55]
2018	[11]	[26]	[41]	[56]
2019	[12]	[27]	[42]	[57]
2020	[13]	[28]	[43]	[58]
2021	[14]	[29]	[44]	[59]
2022	[15]	[30]	[45]	[60]

**NOTES/QUESTIONS:**

**Description**

<b>A</b>	_____	[2]
<b>B</b>	_____	[2]
<b>C</b>	_____	[2]
<b>D</b>	_____	[2]

<b>Prior C/O Year</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
	_____	_____	_____	_____
2003	_____	_____	_____	_____
2004	_____	_____	_____	_____
2005	_____	_____	_____	_____
2006	_____	_____	_____	_____
2007	_____	_____	_____	_____
2008	_____	_____	_____	_____
2009	_____	_____	_____	_____
2010	_____	_____	_____	_____
2011	_____	_____	_____	_____
2012	_____	_____	_____	_____
2013	_____	_____	_____	_____
2014	_____	_____	_____	_____
2015	_____	_____	_____	_____
2016	_____	_____	_____	_____
2017	_____	_____	_____	_____
2018	_____	_____	_____	_____
2019	_____	_____	_____	_____
2020	_____	_____	_____	_____
2021	_____	_____	_____	_____
2022	_____	_____	_____	_____

**NOTES/QUESTIONS:**

**20 Year Carryovers - Pre-TCJA**

Prior C/O Year	Net Operating Loss	AMT Net Operating Loss
2003	_____ [1]	_____ [21]
2004	_____ [2]	_____ [22]
2005	_____ [3]	_____ [23]
2006	_____ [4]	_____ [24]
2007	_____ [5]	_____ [25]
2008	_____ [6]	_____ [26]
2009	_____ [7]	_____ [27]
2010	_____ [8]	_____ [28]
2011	_____ [9]	_____ [29]
2012	_____ [10]	_____ [30]
2013	_____ [11]	_____ [31]
2014	_____ [12]	_____ [32]
2015	_____ [13]	_____ [33]
2016	_____ [14]	_____ [34]
2017	_____ [15]	_____ [35]

**Indefinite Carryovers - Starting in 2018**

	Net Operating Loss	AMT Net Operating Loss
Post-TCJA	_____ [20]	_____ [40]

**NOTES/QUESTIONS:**

This page has been prepared to present the details of prior year income tax returns and is provided for informational purposes only.

	2019 Amounts	2020 Amounts	2021 Amounts	2022 Amounts
Filing Status (1 = Single, 2 = MFJ, 3 = MFS, 4 = HOH, 5 = QW)	_____	_____	_____	_____
Salaries and wages	_____	_____	_____	_____
Interest income	_____	_____	_____	_____
Tax-exempt interest	_____	_____	_____	_____
Dividend income	_____	_____	_____	_____
Qualified dividends	_____	_____	_____	_____
Business income/loss	_____	_____	_____	_____
Capital gains and losses	_____	_____	_____	_____
Other gains and losses	_____	_____	_____	_____
IRA distributions, pensions, annuities	_____	_____	_____	_____
Rent, royalty, farm rental income	_____	_____	_____	_____
Partnership/S corp income	_____	_____	_____	_____
Estate or trust income	_____	_____	_____	_____
Farm income/loss	_____	_____	_____	_____
Other income/loss	_____	_____	_____	_____
<b>Total income -</b>	_____	_____	_____	_____
Total adjustments to income	_____	_____	_____	_____
<b>Adjusted gross income -</b>	_____	_____	_____	_____
Medical expenses	_____	_____	_____	_____
State and local taxes	_____	_____	_____	_____
Interest expenses	_____	_____	_____	_____
Charitable contributions	_____	_____	_____	_____
Other itemized deductions	_____	_____	_____	_____
Allowable itemized deductions	_____	_____	_____	_____
Standard deduction	_____	_____	_____	_____
<b>Standard or itemized deduction taken -</b>	_____	_____	_____	_____
Exemptions	_____	_____	_____	_____
Qualified Business Income Deduction	_____	_____	_____	_____
<b>Taxable income -</b>	_____	_____	_____	_____
Tax on taxable income	_____	_____	_____	_____
Alternative minimum tax	_____	_____	_____	_____
Total credits	_____	_____	_____	_____
<b>Net tax liability -</b>	_____	_____	_____	_____
Self-employment taxes	_____	_____	_____	_____
Other taxes	_____	_____	_____	_____
<b>Total tax -</b>	_____	_____	_____	_____
Income tax withheld	_____	_____	_____	_____
Estimated tax payments	_____	_____	_____	_____
Other payments	_____	_____	_____	_____
<b>Total payments -</b>	_____	_____	_____	_____
<b>Tax due/-refund -</b>	_____	_____	_____	_____
Penalties and interest	_____	_____	_____	_____
<b>Net tax due/-refund -</b>	_____	_____	_____	_____
Refund applied to estimated tax payments	_____	_____	_____	_____
Refund received	_____	_____	_____	_____
<b>Marginal tax rate -</b>	_____ %	_____ %	_____ %	_____ %
<b>Effective tax rate -</b>	_____ %	_____ %	_____ %	_____ %

NOTES/QUESTIONS:

General: 1040 **Personal Information**

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying surviving spouse) \_\_\_\_\_

Mark if you were married but living apart all year \_\_\_\_\_ Mark if your nonresident alien spouse does not have an ITIN \_\_\_\_\_

**Taxpayer** **Spouse**

Social security number \_\_\_\_\_

First name \_\_\_\_\_

Last name \_\_\_\_\_

Occupation \_\_\_\_\_

Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank) \_\_\_\_\_

Mark if legally blind \_\_\_\_\_

Mark if dependent of another taxpayer \_\_\_\_\_

Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N) \_\_\_\_\_

Date of birth \_\_\_\_\_

Date of death \_\_\_\_\_

Work/daytime telephone number/ext number \_\_\_\_\_

Do you authorize us to discuss your return with the IRS (Y, N) \_\_\_\_\_

General: 1040, Contact **Present Mailing Address**

Address \_\_\_\_\_

Apartment number \_\_\_\_\_

City/State postal code/Zip code \_\_\_\_\_

Foreign country name \_\_\_\_\_

Foreign phone number \_\_\_\_\_

Home/evening telephone number \_\_\_\_\_

Taxpayer email address \_\_\_\_\_

Spouse email address \_\_\_\_\_

General: 1040 **Dependent Information**

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	Care expenses paid for dependent
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Credits: 2441 **Child and Dependent Care Expenses**

Provider information:

Business name \_\_\_\_\_

First and Last name \_\_\_\_\_

Street address \_\_\_\_\_

City, state, and zip code \_\_\_\_\_

Social security number OR Employer identification number \_\_\_\_\_

Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP) \_\_\_\_\_

Amount paid to care provider in 2023 \_\_\_\_\_

**Taxpayer** **Spouse**

Employer-provided dependent care benefits that were forfeited \_\_\_\_\_

**NOTES/QUESTIONS:**

Income: W2 **Salary and Wages**

Please provide all copies of Form W-2 that you receive.  
 Below is a list of the Form(s) W-2 as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Retirement: 1099R **Pension, IRA, and Annuity Distributions**

Please provide all copies of Form 1099-R that you receive.  
 Below is a list of the Form(s) 1099-R as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: K1, K1T **Schedules K-1**

Please provide all copies of Schedule K-1 that you receive.  
 Below is a list of the Schedule(s) K-1 as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: W2G **Gambling Income**

Please provide all copies of Form W-2G that you receive.  
 Below is a list of the Form(s) W-2G as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___

Educate: 1099Q **Qualified Education Plan Distributions**

Please provide all copies of Form 1099-Q that you receive.  
 Below is a list of the Form(s) 1099-Q as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___

NOTES/QUESTIONS:



Income: B1 **Interest Income**

Please provide all copies of Form 1099-INT or other statements reporting interest income.

T/S/J	Payer Name	Interest Income	Prior Year Information
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income: B3 **Seller Financed Mortgage Interest**

T, S, J \_\_\_\_\_ Payer's name \_\_\_\_\_ Payer's social security number \_\_\_\_\_  
 Payer's address, city, state, zip code \_\_\_\_\_  
 Amount received in 2023 \_\_\_\_\_ Amount received in 2022 \_\_\_\_\_

Income: B2 **Dividend Income**

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Income: D **Sales of Stocks, Securities, and Other Investment Property**

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Income: Income **Other Income**

Please provide copies of all supporting documentation.

State and local income tax refunds			<b>2023 Information</b>	<b>Prior Year Information</b>
			_____	_____
Alimony received	T/S	Agreement Date	<b>2023 Information</b>	<b>Prior Year Information</b>
	_____	_____	_____	_____
		<b>Taxpayer</b>	<b>Spouse</b>	<b>Prior Year Information</b>
Unemployment compensation		_____	_____	_____
Unemployment compensation repaid		_____	_____	_____
Social security benefits		_____	_____	_____
Medicare premiums to be reported on Schedule A		_____	_____	_____
Railroad retirement benefits		_____	_____	_____
<b>T/S/J</b>			<b>2023 Information</b>	<b>Prior Year Information</b>
Other Income:			_____	_____
_____			_____	_____
_____			_____	_____



1040 Adj: IRA

**Adjustments to Income - IRA Contributions**

Please provide year end statements for each account and any Form 8606 not prepared by this office.

Taxpayer Spouse

**Traditional IRA Contributions for 2023 -**

If you want to contribute the maximum allowable traditional IRA contribution amount,

enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)

Enter the total traditional IRA contributions made for use in 2023

**Roth IRA Contributions for 2023 -**

Mark if you want to contribute the maximum Roth IRA contribution

Enter the total Roth IRA contributions made for use in 2023

Educate: Educate2

**Higher Education Deductions and/or Credits**

Complete this section if you paid interest on a qualified student loan in 2023 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2023 Information	Prior Year Information
___	_____	_____	_____
___	_____	_____	_____

Complete this section if you paid qualified education expenses for higher education costs in 2023.

Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.

Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____
___	___	_____	_____	_____	_____	_____

\*Education Expense Code: 1 = American opportunity credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction

The student qualifies for the American opportunity credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has no felony drug convictions on student's record.

1040 Adj: 3903

**Job Related Moving Expenses**

Complete this section if you moved to a new home due to service in the armed forces.

Description of move	_____
Taxpayer/Spouse/Joint (T, S, J)	_____
Mark if the move was due to service in the armed forces	___
Number of miles from old home to new workplace	_____
Number of miles from old home to old workplace	_____
Mark if move is outside United States or its possessions	___
Transportation and storage expenses	_____
Travel and lodging (not including meals)	_____
Total amount reimbursed for moving expenses	_____

1040 Adj: OtherAdj

**Other Adjustments to Income**

Alimony Paid:

T/S	Date*	Recipient name	Recipient SSN	2023 Information	Prior Year Information
___	___	_____	_____	_____	_____
Street address		_____			
City, State and Zip code		_____			

\*Enter the divorce/separation agreement date

Taxpayer Spouse Prior Year Information

Educator expenses:

_____	_____	_____	_____
_____	_____	_____	_____

Other adjustments:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Itemized: A1 **Medical and Dental Expenses**

T/S/J		2023 Information	Prior Year Information
—	Medical and dental expenses	_____	_____
—	Medical insurance premiums you paid***	_____	_____
—	Long-term care premiums you paid***	_____	_____
—	Prescription medicines and drugs	_____	_____
—	Miles driven for medical items (22 cents)	_____	_____

\*\*\*Do not include pre-tax amounts paid by an employer-sponsored plan, amounts paid for your self-employed business, or Medicare premiums entered on Form Lite-3

Itemized: A1 **Tax Expenses**

T/S/J		2023 Information	Prior Year Information
—	State/local income taxes paid	_____	_____
—	2022 state and local income taxes paid in 2023	_____	_____
—	Sales tax paid on actual expenses	_____	_____
—	Real estate taxes paid	_____	_____
—	Personal property taxes	_____	_____
—	Other taxes	_____	_____

Itemized: A2 **Interest Expenses**

T/S/J		2023 Information	Prior Year Information
—	Home mortgage interest From Form 1098	_____	_____
T/S/J	Other home mortgage interest paid to individuals:		
	<b>Payee's Name</b>	<b>SSN or EIN</b>	<b>2023 Information</b>
—	_____	_____	_____
	<b>Address</b>	<b>City</b>	<b>State</b> <b>Zip Code</b>
—	_____	_____	_____
T/S/J		<b>2023 Information</b>	<b>Prior Year Information</b>
—	Investment interest expense, other than on Sch K-1s:	_____	_____
	Refinancing Information: <b>Refinance #1</b>	<b>Refinance #2</b>	
T/S/J			
—	Recipient/Lender name	_____	_____
—	Total points paid at time of refinance	_____	_____
—	Date of refinance	_____	_____
—	Term of new loan (in months)	_____	_____
—	Reported on Form 1098 in 2023	_____	_____

Itemized: A3 **Charitable Contributions**

T/S/J		2023 Information	Prior Year Information
—	Contributions made by cash or check	_____	_____
—	Volunteer miles driven	_____	_____
—	Noncash items, such as: Goodwill, Salvation Army	_____	_____

Itemized: A3, A-St **Miscellaneous Deductions**

T/S/J		2023 Information	Prior Year Information
—	Other expenses _____	_____	_____
—	Gambling losses (enter only if you have gambling income)	_____	_____
	<b>***STATE USE ONLY - Complete the following fields only if you file a state return in AL, AR, CA, HI, MN, NY or PA</b>		
T/S/J		<b>2023 Information</b>	<b>Prior Year Information</b>
—	Unreimbursed expenses***	_____	_____
—	Union dues, other than amounts reported on Form W-2***	_____	_____
—	Tax preparation fees***	_____	_____
—	Other expenses, subject to 2% AGI limitation***:	_____	_____
—	_____	_____	_____
—	Safe deposit box rental***	_____	_____
—	Investment expenses, other than on Schedule(s) K-1 or Form(s) 1099-DIV/INT***	_____	_____

General: Bank

**Direct Deposit/Electronic Funds Withdrawal Information**

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct. \_\_\_\_\_

Primary account:

Financial institution routing transit number \_\_\_\_\_  
 Name of financial institution \_\_\_\_\_  
 Your account number \_\_\_\_\_  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_  
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_  
 Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ or Percent (xxx.xx) \_\_\_\_\_

Secondary account #1:

Financial institution routing transit number \_\_\_\_\_  
 Name of financial institution \_\_\_\_\_  
 Your account number \_\_\_\_\_  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_  
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_  
 Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ or Percent (xxx.xx) \_\_\_\_\_

Secondary account #2:

Financial institution routing transit number \_\_\_\_\_  
 Name of financial institution \_\_\_\_\_  
 Your account number \_\_\_\_\_  
 Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_  
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) \_\_\_\_\_  
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) \_\_\_\_\_  
 Enter the maximum dollar amount, or percentage of total refund Dollar \_\_\_\_\_ or Percent (xxx.xx) \_\_\_\_\_

\*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Electronic Filing: ID Auth

**Identity Authentication**

**Taxpayer -**

Form of identification ( 1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) \_\_\_\_\_  
 Identification number \_\_\_\_\_  
 Issue date \_\_\_\_\_  
 Expiration date \_\_\_\_\_  
 Location of issuance \_\_\_\_\_  
 Document number (New York only) \_\_\_\_\_

**Spouse -**

Form of identification ( 1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) \_\_\_\_\_  
 Identification number \_\_\_\_\_  
 Issue date \_\_\_\_\_  
 Expiration date \_\_\_\_\_  
 Location of issuance \_\_\_\_\_  
 Document number (New York only) \_\_\_\_\_

**NOTES/QUESTIONS:**



Preparer use only

Activity name \_\_\_\_\_

Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.

		Description of Asset Acquired	Date Acquired	Cost or Basis
<b>EXAMPLE</b>		2023 Model T - (EXAMPLE ASSET)	03/09/23	25,750
	Comments:	22,500 job-related miles, 25,000 total miles		
1	Comments:			
2	Comments:			
3	Comments:			
4	Comments:			
5	Comments:			
6	Comments:			
7	Comments:			
8	Comments:			
9	Comments:			
10	Comments:			
11	Comments:			
12	Comments:			
13	Comments:			
14	Comments:			
15	Comments:			
16	Comments:			
17	Comments:			
18	Comments:			
19	Comments:			
20	Comments:			
21	Comments:			
22	Comments:			
23	Comments:			
24	Comments:			
25	Comments:			

## Alabama General Information

If you moved during the tax year, name of Alabama city moved to \_\_\_\_\_ [1] Zip code \_\_\_\_\_ [2]  
 If divorced during the tax year, enter former spouse's social security number \_\_\_\_\_ [3]

If you did not file a prior year Alabama tax return, enter reason: \_\_\_\_\_ [4]

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Contributions

**Enter the amount of contributions you wish to make:**  
**Political Contributions**

	Taxpayer	Spouse
Election campaign fund contribution (\$1.00) (1 = Democratic party fund, 2 = Republican party fund)	_____ [5]	_____ [6]

### Charitable Contributions

Senior Services Trust Fund	_____ [7]	Firefighters Benefit Fund	_____ [16]
Arts Development Fund	_____ [8]	Breast and Cervical Cancer Program	_____ [17]
Nongame Wildlife Fund	_____ [9]	Victims of Violence Assistance	_____ [18]
Child Abuse Trust Fund	_____ [10]	Military Support Foundation	_____ [19]
Veterans Program	_____ [11]	Spay-Neuter Program	_____ [20]
Historic Preservation Fund	_____ [12]	Cancer Research Institute	_____ [21]
State Veterans Cemetery at Spanish Fort Foundation	_____ [13]	Association of Rescue Squads	_____ [22]
Foster Care Trust Fund	_____ [14]	USS Alabama Battleship Commission	_____ [23]
Mental Health	_____ [15]	Children First Trust Fund	_____ [24]

## Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Alabama**

Part-year residency dates:  
 From \_\_\_\_\_ [25]  
 To \_\_\_\_\_ [26]  
 If a nonresident of Alabama, enter state of legal residence \_\_\_\_\_ [27]

## Credits

### Basic Skills Education Credit:

Dept of Education certification number \_\_\_\_\_ [28]  
 Name of sponsoring employer or firm \_\_\_\_\_ [29]  
 Name of approved provider \_\_\_\_\_ [30]  
 Location of provider \_\_\_\_\_ [31]  
 Total expenses \_\_\_\_\_ [32]

### Rural Physician Credit:

Hospital where services provided \_\_\_\_\_ [33]  
 Community where services provided \_\_\_\_\_ [34]

## NOTES/QUESTIONS:

## Arizona General Information

Last name on prior returns, if different \_\_\_\_\_ [1]

**If you were a part-year resident during the tax year, enter the dates you lived in Arizona**

Part-year residency dates:

From \_\_\_\_\_ [2]

To \_\_\_\_\_ [3]

Other state(s) of residency (Part-year residents only) \_\_\_\_\_ [4] \_\_\_\_\_ [5] \_\_\_\_\_ [6] \_\_\_\_\_ [7]

Mark if on active military assignment in Arizona during the year (Part-year residents and Nonresidents only) \_\_\_\_\_ [8]

## Contributions

**Amount of political and charitable contributions you wish to make to:**

### Political Contributions

Political gift \_\_\_\_\_ [9]

Name of party ( 2 = Democratic, 3 = Libertarian, 4 = Republican) \_\_\_\_\_ [10]

### Charitable Contributions

Solutions Teams Assigned to Schools \_\_\_\_\_ [11]

Arizona Wildlife Fund \_\_\_\_\_ [12]

Child Abuse Prevention Fund \_\_\_\_\_ [13]

Domestic Violence Services \_\_\_\_\_ [14]

Neighbors Helping Neighbors Fund \_\_\_\_\_ [15]

Special Olympics Fund \_\_\_\_\_ [16]

Veterans Donation Fund \_\_\_\_\_ [17]

I Didn't Pay Enough Fund \_\_\_\_\_ [18]

Sustainable State Parks and Road Fund \_\_\_\_\_ [19]

Spay/Neuter of Animals \_\_\_\_\_ [20]

## Property Tax Credit Information

### Full Year Residents Only

Homestead status on December 31 (1 = Rent, 2 = Own) \_\_\_\_\_ [21]

Mark if you:

Received Title 16, SSI payments \_\_\_\_\_ [22]

Lived alone \_\_\_\_\_ [23]

Property taxes paid through rent payments \_\_\_\_\_ [24]

If claimed as a dependent on another's return, enter claimant's information:

Name \_\_\_\_\_ [25]

Social security number \_\_\_\_\_ [26]

Address \_\_\_\_\_ [27] Apartment number \_\_\_\_\_ [28]

City \_\_\_\_\_ [29] State \_\_\_\_\_ [30] Zip code \_\_\_\_\_ [31]

Income earned by other household residents \_\_\_\_\_ [32]

**NOTES/QUESTIONS:**

## Arkansas General Information

Taxpayer deaf \_\_\_\_\_ [1]  
 Spouse deaf \_\_\_\_\_ [2]  
 Early childhood program - certificate number \_\_\_\_\_ [3]  
 State political contribution \_\_\_\_\_ [4]

	<b>Taxpayer</b>	<b>Spouse</b>
Contributions to a long-term intergenerational trust	_____ [5]	_____ [6]

## Contributions

### Amount of charitable contributions you wish to make to:

Disaster Relief Program	_____ [7]
Game and Fish Foundation	_____ [8]
School for the Blind and Deaf	_____ [9]
Baby Sharon's Children's Catastrophic Illness Program	_____ [10]
Organ Donor Awareness Education Program	_____ [11]
Area Agencies on Aging	_____ [12]
Military Family Relief	_____ [13]
Newborn Umbilical Cord Blood Initiative	_____ [14]
Law Enforcement Family Relief Trust Fund	_____ [15]

## Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Arkansas**

Part-year residency dates:

From		_____ [16]
To		_____ [17]
State of residency if nonresident of Arkansas		_____ [18]

### NOTES/QUESTIONS:



## California General Information

Prior year last name

Taxpayer \_\_\_\_\_ [1]

Spouse \_\_\_\_\_ [2]

## Health Care Coverage

Entire family covered for full year with minimum essential health care coverage (1 = Yes, 2 = No) \_\_\_\_\_ [3]

## Use Tax

Item purchased	Purchase price	County (City)	Sales Tax paid
_____	_____	_____	_____ [4]
_____	_____	_____	_____

## Contributions

### Amount of contributions you wish to make to:

Seniors Special Fund _____ [5]	Parks Pass Purchase (\$195) _____ [15]
Alzheimer's Disease/Related Dementia Fund _____ [6]	State Parks Protection Fund _____ [16]
Rare and Endangered Species Preservation Program _____ [7]	Protect Our Coast and Oceans Fund _____ [17]
Breast Cancer Research Fund _____ [8]	Keep Arts in Schools Fund _____ [18]
Firefighters' Memorial Fund _____ [9]	California Senior Citizen Advocacy Fund _____ [19]
Emergency Food for Families Fund _____ [10]	Native California Wildlife Rehabilitation _____ [20]
Peace Officer Memorial Foundation Fund _____ [11]	Rape Backlog Kit Fund _____ [21]
Sea Otter Fund _____ [12]	Suicide Prevention Fund _____ [22]
Cancer Research Fund _____ [13]	Mental Health Crisis Prevention Fund _____ [24]
School Supplies for Homeless Children Fund _____ [14]	

## Renter Information

Number of months rented principal residence in California in 2023 \_\_\_\_\_ [33]

Lived with person claiming dependency exemption for more than 6 months (Dependent of another only) \_\_\_\_\_ [34]

Property rented was exempt from property tax in 2023 \_\_\_\_\_ [35]

Taxpayer claimed homeowner's property tax exemption in 2023 \_\_\_\_\_ [36]

Spouse claimed homeowner's property tax exemption during 2023 \_\_\_\_\_ [37]

Maintained separate residences for the entire year \_\_\_\_\_ [38]

Addresses if more than one or different from mailing address \_\_\_\_\_ [39]

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

Date Rented From \_\_\_\_\_

Date Rented To \_\_\_\_\_

Landlord information

Name \_\_\_\_\_ [40]

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_

### NOTES/QUESTIONS:

## California Residency Information

### Part-year, Nonresident

	Taxpayer	Spouse
State of domicile	_____ [1]	_____ [2]
Number of days spent in California	_____ [3]	_____ [4]
Owned California home or property	_____ [5]	_____ [6]
Part-year resident:		
Date moved into California	_____ [7]	_____ [9]
Prior state of residence	_____ [8]	_____ [10]
Date moved out of California	_____ [11]	_____ [13]
New state of residence	_____ [12]	_____ [14]
Nonresident or full-year resident for entire year:		
State of residence	_____ [15]	_____ [16]

### Prior Year Residency Information

	Taxpayer	Spouse
Prior residency information:		
From	_____ [17]	_____ [19]
To	_____ [18]	_____ [20]

## Military Personnel

### Part-year, Nonresident

	Taxpayer	Spouse
State in which stationed	_____ [21]	_____ [22]

## Electronic Filing Information for Military

	Taxpayer	Spouse
Date deployed overseas or entered combat zone/QHDA	_____ [23]	_____ [26]
Date returned from overseas or combat zone/QHDA	_____ [24]	_____ [27]
Duty (A = Military overseas, B = Combat Zone/QHDA, C = NAT Guard)	_____ [25]	_____ [28]
Combat Zone/QHDA Operation/Area served		
Taxpayer	_____ [29]	_____ [29]
Spouse	_____ [30]	_____ [30]

**NOTES/QUESTIONS:**

## Colorado Use Tax

Purchases subject to state sales or use tax \_\_\_\_\_ [1]  
 Special district code \_\_\_\_\_ [2]  
 Purchases subject to special district sales or use tax if less than the total purchase \_\_\_\_\_ [3]

### Contributions

**Amount of charitable contributions you wish to make to:**

Nongame Conservation and Wildlife Restoration Cash Fund \_\_\_\_\_ [4]  
 Domestic Abuse Fund \_\_\_\_\_ [5]  
 Homeless Prevention Activities Fund \_\_\_\_\_ [6]  
 Western Slope Military Veterans Cemetery Fund \_\_\_\_\_ [7]  
 Pet Overpopulation Fund \_\_\_\_\_ [8]  
 Military Family Relief Fund \_\_\_\_\_ [9]  
 American Red Cross Colorado Disaster Response, Readiness, and Preparedness Fund \_\_\_\_\_ [10]  
 Habitat for Humanity of Colorado Fund \_\_\_\_\_ [11]  
 Special Olympics of Colorado \_\_\_\_\_ [12]  
 Colorado Healthy Rivers Fund \_\_\_\_\_ [13]  
 Alzheimer's Association Fund \_\_\_\_\_ [14]  
 Colorado Cancer Fund \_\_\_\_\_ [15]  
 Make-A-Wish Foundation of Colorado Fund \_\_\_\_\_ [16]  
 Unwanted Horse Fund \_\_\_\_\_ [17]  
 Feeding Colorado \_\_\_\_\_ [19]  
 Colorado Nonprofit Fund \_\_\_\_\_ [20]  
 Charitable organization Secretary of State registration number \_\_\_\_\_ [21]  
 Name of registered organization \_\_\_\_\_ [22]

### Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Colorado**

	Taxpayer	Spouse
Residency status (If taxpayer and spouse are different):		
Resident	_____ [23]	_____ [24]
Nonresident	_____ [25]	_____ [26]
Part-year resident	_____ [27]	_____ [28]
Military nonresident	_____ [29]	_____ [30]
Part-year residency dates:		
From	_____ [31]	_____ [33]
To	_____ [32]	_____ [34]

**NOTES/QUESTIONS:**

## Connecticut Charitable Contributions

### Amount of contributions you wish to make to:

AIDS Research _____	[1]	Safety Net Services _____	[5]
Organ Transplant _____	[2]	Military Relief _____	[6]
Endangered Species/Wildlife Fund _____	[3]	CHET Baby Scholar _____	[7]
Breast Cancer Research _____	[4]	Mental Health Community Investment Acct _____	[8]

## Use Tax Information

### Use Tax-Enter any out-of-state purchases made on which sales tax was not paid to the seller:

Purchase 1	Description _____	Date of purchase _____	[9]
	Retailer/Service Provider: _____	Purchase price _____	
	Type Code: _____	Out of state tax paid _____	
Purchase 2	Description _____	Date of purchase _____	
	Retailer/Service Provider: _____	Purchase price _____	
	Type Code: _____	Out of state tax paid _____	

### Use Tax Type Codes

1 = Computer & data processing services	3 = General sales tax
2 = Boats, boat motors and trailers	4 = Luxury items

## Property Tax Information

### Enter property taxes paid on primary residence and/or motor vehicle:

Primary Residence Description (Enter street address)(Resident only) _____	[10]
Auto 1 Description (Enter year, make and model)(Resident only) _____	[11]
Auto 2 Description (Enter year, make and model)(MFJ Resident only) _____	[12]

	Name of CT Tax Town or District	Date Paid	Date Paid	Amount Paid
Primary Residence (Resident only) _____	[13]	[14]	[15]	
Auto 1 (Resident only) _____	[16]	[17]	[18]	[19]
Auto 2 (MFJ Resident only) _____	[20]	[21]	[22]	[23]

## Part-year Resident Information

### If you were a part-year resident during the tax year, enter the dates you lived in Connecticut:

	Taxpayer	Spouse
Enter residency dates:		
From _____	[24]	[26]
To _____	[25]	[27]
Indicate type of move (1 = Moved into Connecticut, 2 = Moved out of Connecticut) _____	[28]	[31]
Did you earn income from Connecticut sources during nonresident period? (Y, N) _____	[29]	[32]
State of prior or new residence _____	[30]	[33]

### Enter the following amounts only if you do NOT know the exact amount of your Connecticut source information

Basis for calculating apportionment (1 = Working days, 2 = Sales, 3 = Mileage) _____	[34]
Working days (or other basis) outside Connecticut _____	[35]
Working days (or other basis) inside Connecticut _____	[36]
Nonworking days (holidays, weekends, etc) _____	[37]
Total income being apportioned _____	[38]

## NOTES/QUESTIONS:

## Delaware General Information

	Taxpayer	Spouse
Mark if totally disabled	_____ [1]	_____ [2]
Volunteer firefighter Fire Company number (Resident only)	_____ [3]	_____ [4]

## Contributions

Amount of contributions you wish to make to:

	Taxpayer	Spouse
Non-Game Wildlife	_____ [5]	_____ [6]
Beau Biden Foundation	_____ [7]	_____ [8]
Emergency Housing	_____ [9]	_____ [10]
Breast Cancer Education	_____ [11]	_____ [12]
Organ Donations	_____ [13]	_____ [14]
Diabetes Education	_____ [15]	_____ [16]
Veteran's Home	_____ [17]	_____ [18]
Delaware National Guard	_____ [19]	_____ [20]
Juvenile Diabetes Fund	_____ [21]	_____ [22]
Multiple Sclerosis Society	_____ [23]	_____ [24]
Ovarian Cancer Fund	_____ [25]	_____ [26]
21st Fund for Children	_____ [27]	_____ [28]
White Clay Creek	_____ [29]	_____ [30]
Home of the Brave	_____ [31]	_____ [32]
Senior Trust Fund	_____ [33]	_____ [34]
Veteran's Trust Fund	_____ [35]	_____ [36]
Protecting Delaware's Children Fund	_____ [37]	_____ [38]
Food Bank of Delaware	_____ [39]	_____ [40]
DE Habitat for Humanity	_____ [41]	_____ [42]
B+ Childhood Cancer	_____ [43]	_____ [44]
Combined Campaign for Justice	_____ [45]	_____ [46]

## Part-year Resident Information

If you were a part-year resident during the tax year, enter the dates you lived in Delaware

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [47]	_____ [49]
To	_____ [48]	_____ [50]

**NOTES/QUESTIONS:**

## District of Columbia Property Tax Credit Information

### If renting, enter rental information below (Residents only)

Type of property (1 = Private home, 2 = Apartment, 3 = Rooming house, 4 = Condominium, 5 = Cooperative) \_\_\_\_\_ [1]  
 Landlord's name \_\_\_\_\_ [2]  
 Landlord's address (Number and street) \_\_\_\_\_ [3]  
 \_\_\_\_\_ [4]  
 Apartment number \_\_\_\_\_ [5]  
 City \_\_\_\_\_ [6]  
 State \_\_\_\_\_ [7]  
 Zip code \_\_\_\_\_ [8]  
 Landlord's telephone number \_\_\_\_\_ [9]  
 Rent paid \_\_\_\_\_ [10]

### If property owner, enter real property information below

Square number \_\_\_\_\_ [11]  
 Suffix number \_\_\_\_\_ [12]  
 Lot number \_\_\_\_\_ [13]

### Use Tax

Purchases subject to use tax \_\_\_\_\_  
 Merchandise, services and rentals \_\_\_\_\_ [14]      Purchases of catered food or drink \_\_\_\_\_ [16]  
 Alcoholic beverages \_\_\_\_\_ [15]      Rentals of non-commercial vehicles \_\_\_\_\_ [17]

## Health Care Shared Responsibility

Mark if entire family has qualifying health insurance coverage for every month in 2023 \_\_\_\_\_ [18]  
 Mark if exemption applies to health insurance requirements \_\_\_\_\_ [19]

## Contribution

### Amount of contribution you wish to make to:

DC Statehood Delegation Fund (Political Contribution) \_\_\_\_\_ [20]  
 Public Trust for Drug Prevention and Children at Risk (Charitable Contribution) \_\_\_\_\_ [21]  
 Anacostia River Cleanup and Prevention Fund (Charitable Contribution) \_\_\_\_\_ [22]

## Part-year Resident Information

### If you were a part-year resident during the tax year, enter the dates you lived in the District of Columbia

	From	To
Part-year residency dates	_____ [23]	_____ [24]

## Disability Information

	Name of Employer	Payer, if other than employer	No. of Weeks
Taxpayer	_____ [25]	_____ [26]	_____ [27]
Spouse	_____ [28]	_____ [29]	_____ [30]
		<b>Taxpayer</b>	<b>Spouse</b>
Mark if physician's certification previously filed		_____ [31]	_____ [32]

Otherwise, enter:

Taxpayer's physician's name	_____ [33]	_____ [34]	_____ [35]
Address, apartment number	_____ [36] _____ [37]		
City, state, zip code	_____ [38] _____ [39] _____ [40]		
Telephone number	_____ [41]		
Spouse's physician's name	_____		
Address, apartment number	_____		
City, state, zip code	_____		
Telephone number	_____		

## Georgia General Information

**Taxpayer**

**Spouse**

If disabled, enter the following:

Type of disability	_____ [1]	_____ [2]
Date of disability	_____ [3]	_____ [4]
Number of exemptions for unborn dependents with detectable human heartbeat		_____ [5]

## Contributions

**Amount of contributions you wish to make to:**

Wildlife Conservation Fund	_____ [6]
Fund for Children and Elderly	_____ [7]
Cancer Research Fund	_____ [8]
Land Conservation Program	_____ [9]
National Guard Foundation	_____ [10]
Dog and Cat Sterilization Fund	_____ [11]
Save the Cure Fund	_____ [12]
Realizing Educational Achievement Can Happen Program	_____ [13]
Public Safety Memorial Grant	_____ [14]
Disabled Veterans' Scholarship Fund	_____ [15]

## Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Georgia**

**Taxpayer**

**Spouse**

Part-year residency dates:

From	_____ [16]	_____ [18]
To	_____ [17]	_____ [19]

**NOTES/QUESTIONS:**

## Hawaii General Information

Mark if first time filer \_\_\_\_\_ [1]  
 If you (or spouse) are blind, deaf or totally disabled, has impairment been certified? (Special disability exemption: T = Taxpayer, S = Spouse, B = Both) \_\_\_\_\_ [2]  
 Current year distributions from an individual housing account not used for home purchase \_\_\_\_\_ [3]  
 Reservist or National Guard pay included in W-2 income \_\_\_\_\_ [4]  
 Payments to an individual housing account \_\_\_\_\_ [5]

## Contributions

### Amount of contributions you wish to make to:

Election campaign fund - taxpayer (Y, N) \_\_\_\_\_ [6]  
 Election campaign fund - spouse (Y, N) \_\_\_\_\_ [7]  
 \$2 School-Level Minor Repairs and Maintenance Special Fund (T = Taxpayer, S = Spouse, B = Both) \_\_\_\_\_ [8]  
 \$2 Public Libraries Special Fund (T = Taxpayer, S = Spouse, B = Both) \_\_\_\_\_ [9]  
 \$5 Children's Trust, Domestic Violence, and Abuse Special Accounts (T = Taxpayer, S = Spouse, B = Both) \_\_\_\_\_ [10]

## Rental Credit Information

### Rental credits can only be claimed by persons with Hawaii residence of 9 or more months during the calendar year

Residence Information: Starting Month of Occupancy \_\_\_\_\_ Ending Month of Occupancy \_\_\_\_\_ [11]  
 Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State \_\_\_\_\_  
 Zip \_\_\_\_\_  
 Owner Information: Name \_\_\_\_\_  
 Business Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State \_\_\_\_\_  
 Zip \_\_\_\_\_  
 Foreign Providence/State \_\_\_\_\_  
 Foreign Country Code \_\_\_\_\_  
 Foreign Country \_\_\_\_\_  
 Foreign Postal Code \_\_\_\_\_  
 Tax ID # \_\_\_\_\_  
 Total rents received for this unit \_\_\_\_\_

## Part-year Resident Information

### If you were a part-year resident during the tax year, enter the dates you lived in Hawaii

Part-year residency dates:  
 From \_\_\_\_\_ [12]  
 To \_\_\_\_\_ [13]

### NOTES/QUESTIONS:



## Idaho General Information

Mark if:

Taxpayer or spouse is a disabled veteran \_\_\_\_\_[1]

Receiving Idaho Public Assistance \_\_\_\_\_[2]

	<b>Taxpayer</b>	<b>Spouse</b>
Number of days eligible for grocery credit if less than full year or total time spent as part year resident	_____ [3]	_____ [4]

### Use Tax

Purchases subject to use tax \_\_\_\_\_ [5]

### Contributions

**Amount of charitable contributions you wish to make to:**

Nongame Wildlife Conservation Fund	_____ [6]
Children's Trust Fund and Child Abuse Prevention	_____ [7]
Special Olympics Idaho	_____ [8]
Idaho Guard and Reserve Family Support Fund	_____ [9]
American Red Cross of Idaho	_____ [10]
Veterans Support Fund	_____ [11]
Idaho Food Bank	_____ [12]
Opportunity Scholarship Program Fund	_____ [13]
Donate grocery credit to the Cooperative Welfare Fund	_____ [14]

### Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Idaho**

	Taxpayer	Spouse
Residency status (1 = Resident, 2 = Resident on active military, 3 = Nonresident, 4 = Part-year resident, 5 = Military nonresident)	_____ [15]	_____ [16]
Part-year residency dates:		
From	_____ [17]	_____ [19]
To	_____ [18]	_____ [20]
State of residence	_____ [21]	_____ [22]

### Adjustments and Credits

Energy efficiency upgrades \_\_\_\_\_ [23]

Adoption expenses \_\_\_\_\_ [24]

Mark if taxpayer or spouse has a developmental disability (T = Taxpayer, S = Spouse, B = Both) \_\_\_\_\_ [25]

**NOTES/QUESTIONS:**

## Illinois General Information

### Use Tax

General merchandise purchases \_\_\_\_\_ [1]  
 Qualifying food, non-prescription drugs and medical appliances purchases \_\_\_\_\_ [2]  
 Sales tax already paid to another state \_\_\_\_\_ [3]

### Contributions

**Amount of contributions you wish to make to:**

Wildlife Preservation \_\_\_\_\_ [4]  
 Alzheimer's Disease Research \_\_\_\_\_ [5]  
 Assistance to the Homeless \_\_\_\_\_ [6]  
 Diabetes Research Fund \_\_\_\_\_ [7]  
 Hunger Relief Fund \_\_\_\_\_ [8]  
 Ronald McDonald House Charities Fund \_\_\_\_\_ [9]  
 100 Club of Illinois Fund \_\_\_\_\_ [10]

### Credits

#### Qualified Education Expenses

Child's Name	Grade	School Name	School City	School Type	Total Tuition, Books, Lab fees
_____ [11]	_____ [12]	_____ [13]	_____ [14]	_____ [15]	_____ [16]
_____ [17]	_____ [18]	_____ [19]	_____ [20]	_____ [21]	_____ [22]
_____ [23]	_____ [24]	_____ [25]	_____ [26]	_____ [27]	_____ [28]
_____ [29]	_____ [30]	_____ [31]	_____ [32]	_____ [33]	_____ [34]
_____ [35]	_____ [36]	_____ [37]	_____ [38]	_____ [39]	_____ [40]
_____ [41]	_____ [42]	_____ [43]	_____ [44]	_____ [45]	_____ [46]
_____ [47]	_____ [48]	_____ [49]	_____ [50]	_____ [51]	_____ [52]
_____ [53]	_____ [54]	_____ [55]	_____ [56]	_____ [57]	_____ [58]

### Property Taxes

Description	Property Index Number
_____	_____ [59]
_____	_____
_____	_____

### Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in Illinois

	<b>Taxpayer</b>	<b>Spouse</b>
Part-year residency dates:		
From _____	_____ [60]	_____ [61]
To _____	_____ [62]	_____ [63]

Mark if you were a resident of any of the following states during the tax year:    IA \_\_\_ [64]    KY \_\_\_ [65]    MI \_\_\_ [66]    WI \_\_\_ [67]

In what states other than above did you reside and/or file a tax return during the tax year? <sup>(8)</sup>

State postal code	State postal code	State postal code
State postal code	State postal code	State postal code
State postal code	State postal code	State postal code
State postal code	State postal code	State postal code

**NOTES/QUESTIONS:**

## Indiana General Information

At least one dependent child is being claimed for the first time \_\_\_\_\_ [3]

	Taxpayer	Spouse
County of residence (as of January 1 of tax year)	_____ [4]	_____ [5]
County of employment (as of January 1 of tax year)	_____ [6]	_____ [7]

### Household employment taxes:

Employee Name _____ [8]	Employee SSN _____
Income _____	State Tax Withheld _____
County Tax Withheld _____	County Code _____

### Contributions

#### Amount of contribution you wish to make to:

Nongame Wildlife Fund	_____ [9]
Military Family Relief Fund	_____ [10]
Public K-12 Education Fund	_____ [11]

## Credit for Donation to an Indiana College or University

Mark this field if you made a cash or noncash contribution to an Indiana college or university \_\_\_\_\_ [12]

## Renter's Information

Taxpayer, Spouse, Joint (T,S,J) _____	Principal address _____ [13]
	City, state, zip code _____
Number of months rented _____	Total rent paid _____
Landlord name _____ [14]	
Landlord address _____	
Landlord city, state, zip code _____	

## Part-year Resident and Nonresident Information

### Enter the dates you lived in Indiana or in other states.

	Taxpayer	Spouse
State of residency (Use these fields if you or your spouse had only one state of residency)	_____ [15]	_____ [16]

States of residency (Use these fields if you or your spouse had more than one state of residency)

Taxpayer, Spouse(T,S)	State Postal Code	From Date	To Date
_____	_____	_____	_____ [17]
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### NOTES/QUESTIONS:

County of residence as of December 31st \_\_\_\_\_ [1]  
 School district \_\_\_\_\_ [2]

**Contributions**

Amount of charitable contributions you wish to make to:

Fish and Wildlife Fund \_\_\_\_\_ [3]  
 State Fairgrounds Renovation \_\_\_\_\_ [4]  
 Firefighters Fund and Veterans Trust Fund \_\_\_\_\_ [5]  
 Child Abuse Prevention \_\_\_\_\_ [6]

**Residency Information**

Residency code \_\_\_\_\_ [7]

Residency Code	
Blank = Both spouses have the same residency status	4 = Taxpayer nonresident, spouse part-year resident
1 = Taxpayer nonresident, spouse resident	5 = Taxpayer resident, spouse part-year resident
2 = Taxpayer resident, spouse nonresident	6 = Taxpayer part-year resident, spouse resident
3 = Taxpayer part-year resident, spouse nonresident	

**Part-year Resident Information**

If you were a part-year resident during the tax year, enter the dates you lived in Iowa

	Spouse	Taxpayer
Part-year residency dates:		
Moved into Iowa	_____ [8]	_____ [10]
Moved out of Iowa	_____ [9]	_____ [11]

**Nonresident Information**

Illinois residents:

Iowa wages or salary only \_\_\_\_\_ [12]  
 Wages or salary and other Iowa source income \_\_\_\_\_ [13]

**NOTES/QUESTIONS:**

## Kansas General Information

County of residence \_\_\_\_\_ [1]  
 School district number \_\_\_\_\_ [2]  
 Mark if name or address has changed \_\_\_\_\_ [3]

## Contributions

**Enter the amount of charitable contributions you wish to make to:**

Chickadee Checkoff \_\_\_\_\_ [4]  
 Senior Citizens Meals On Wheels Contribution Program \_\_\_\_\_ [5]  
 Breast Cancer Research Fund \_\_\_\_\_ [6]  
 Military Emergency Relief Fund \_\_\_\_\_ [7]  
 Kansas Hometown Heroes Fund \_\_\_\_\_ [8]  
 Kansas Creative Arts Industry Fund \_\_\_\_\_ [9]  
 School District Contribution Fund \_\_\_\_\_ [10]  
   School district headquarters county \_\_\_\_\_ [11]  
   School district number \_\_\_\_\_ [12]  
 Kansas Historic Site Contribution Fund \_\_\_\_\_ [13]  
   Historic site number \_\_\_\_\_ [14]

## Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Kansas**

Part-year residency dates:

From \_\_\_\_\_ [15]  
 To \_\_\_\_\_ [16]

**NOTES/QUESTIONS:**

## Kentucky General Information

National Guard member - taxpayer \_\_\_\_\_[1]  
 National Guard member - spouse \_\_\_\_\_[2]  
 Enter your state of residency at the end of the tax year (Part-year and Nonresident only) \_\_\_\_\_[3]

### Use Tax

	Description	Date of Purchase	Amount
Enter any out-of-state purchases made on which sales tax was not paid to the seller	_____	_____	_____ [4]
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

### Contributions

**Amount of political and charitable contributions you wish to make to:**  
**Political Contributions**

	<b>Spouse</b>	<b>Taxpayer</b>
Political Party Fund (1 = Democratic, 2 = Republican, 3 = No Designation)	_____ [5]	_____ [6]

### Charitable Contributions

Nature and Wildlife Fund	_____ [7]
Child Victims' Trust Fund	_____ [8]
Veterans' Program Trust Fund	_____ [9]
Breast Cancer Research and Education Trust Fund	_____ [10]
Farms to Food Banks Trust Fund	_____ [11]
Local History Trust Fund	_____ [12]
Special Olympics Kentucky	_____ [13]
Pediatric Cancer Research Trust Fund	_____ [14]
Rape Crisis Center Trust Fund	_____ [15]
Court Appointed Special Advocate Trust Fund	_____ [16]
YMCA Youth Association Fund	_____ [17]

### Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Kentucky**

Part-year residency dates:

From	_____	[18]
To	_____	[19]
State moved from	_____	[20]
State moved to	_____	[21]

### Nonresident Information

	<b>Spouse</b>	<b>Taxpayer</b>
Mark if:		
Commuted daily to Kentucky employment (VA resident)	_____ [22]	_____ [23]
All Kentucky wage income earned while a resident of a reciprocal state (indicate state(s) below)	_____ [24]	_____ [25]
Resident of state(s)		
Taxpayer	IL _____ [26]	IN _____ [27]
Spouse	MI _____ [28]	OH _____ [29]
	VA _____ [30]	WV _____ [31]
	WI _____ [32]	
	IL _____ [33]	IN _____ [34]
	MI _____ [35]	OH _____ [36]
	VA _____ [37]	WV _____ [38]
	WI _____ [39]	

**NOTES/QUESTIONS:**

**Louisiana General Information**

Mark if name has changed \_\_\_\_\_[1]

**Use Tax**

Enter the amount of any out-of-state purchases on which sales tax was not paid \_\_\_\_\_[2]

**Contributions**

Military Family Assistance Fund	_____ [3]	National Guard Honor Guard for Military Funerals	_____ [13]
Coastal Protection and Restoration Fund	_____ [4]	Louisiana State Troopers Charities, Inc	_____ [14]
START Program	_____ [5]	Louisiana Coalition Against Domestic Violence	_____ [15]
Wildlife Habitat and Natural Heritage Fund	_____ [6]	Dreams Come True	_____ [16]
Louisiana Cancer Trust Fund	_____ [7]	Sexual Trauma Awareness	_____ [17]
Pet Overpopulation Advisory Council	_____ [8]	Louisiana State University Agricultural Center	_____ [18]
Louisiana Food Bank Association	_____ [9]	Maddie's Footprints	_____ [19]
Make-A-Wish of Texas Gulf Coast/Louisiana	_____ [10]	University of New Orleans Foundation	_____ [20]
Louisiana Association of United Ways / 2-1-1	_____ [11]	Southeastern Louisiana University Foundation	_____ [21]
American Red Cross	_____ [12]	Holden's Hope	_____ [22]

**Part-year Resident Information**

	<b>Taxpayer</b>	<b>Spouse</b>
Part-year residency dates:		
From	_____ [23]	_____ [25]
To	_____ [24]	_____ [26]

**Retirement Information**

	<b>Taxpayer</b>	<b>Spouse</b>
Date retired as a:		
Louisiana state employee	_____ [27]	_____ [28]
Louisiana teacher	_____ [29]	_____ [30]
Federal employee	_____ [31]	_____ [32]

	<b>Taxpayer</b>	<b>Spouse</b>
<b>Retirement System Name</b>	<b>Date Retired</b>	
Other retirement information:		
_____	_____	_____ [33]
_____	_____	_____
_____	_____	_____
_____	_____	_____

**NOTES/QUESTIONS:**

## Maine Use Tax

Calculate use tax using .04% of Maine Adjusted Gross Income (For purchases < \$1000 per purchase only) \_\_\_\_\_ [1]  
 Out of state purchases (Enter purchases greater than \$999 and less than \$5,000 per purchase) \_\_\_\_\_ [2]  
 Use tax already paid to another jurisdiction \_\_\_\_\_ [3]  
 Casual rental income \_\_\_\_\_ [4]

## Contributions

### Political Contributions

Contribute \$3 (\$6 if joint) to the Maine Clean Election Fund (1 = Taxpayer, 2 = Spouse, 3 = Joint) \_\_\_\_\_ [5]

### Charitable Contributions

Endangered and Nongame Wildlife Fund "Chickadee Check-off" \_\_\_\_\_ [6]  
 Maine Children's Trust \_\_\_\_\_ [7]  
 Companion Animal Sterilization Fund \_\_\_\_\_ [8]  
 Maine Military Family Relief Fund \_\_\_\_\_ [9]  
 Maine Veterans' Memorial Cemetery Maintenance Fund \_\_\_\_\_ [10]  
 Maine Public Library Fund \_\_\_\_\_ [11]  
 Maine Children's Cancer Research Fund \_\_\_\_\_ [12]  
 Emergency Food Assistance Program Fund \_\_\_\_\_ [13]

### State Park Passes

Number of individual park passes \_\_\_\_\_ [14]  
 Number of vehicle passes \_\_\_\_\_ [15]

## Property Tax Fairness Credit

Not required to file federal or Maine tax return (Filing for Property Tax Fairness only) \_\_\_\_\_ [16]  
 Physical street address if different from mailing address \_\_\_\_\_ [17] \_\_\_\_\_ [18]  
 City, state, zip code \_\_\_\_\_ [19] \_\_\_\_\_ [20] \_\_\_\_\_ [21]  
 Social security disability / supplemental security income (If part-year resident, enter portion received during residency) \_\_\_\_\_ [22]  
 Property tax paid during 2023 (For home up to 10 acres less portion related to business use and special assessments) \_\_\_\_\_ [23]  
 Rent paid for 2023 \_\_\_\_\_ [24]  
 Rent includes heat, utilities, furniture, snow plowing, etc. \_\_\_\_\_ [25] Amount related to heat, etc. \_\_\_\_\_ [26]  
 Landlord #1 name \_\_\_\_\_ Landlord #1 phone number \_\_\_\_\_ [27]  
 Landlord #2 name \_\_\_\_\_ Landlord #2 phone number \_\_\_\_\_

## Part-year Resident Information

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [28]	_____ [30]
To	_____ [29]	_____ [31]
State where stationed	_____ [32]	_____ [33]
State of prior residency	_____ [34]	_____ [35]
Nonresident state of residence	_____ [36]	_____ [37]
Number of days in Maine for any reason	_____ [38]	_____ [39]
Maine property owners only:		
Municipality where owned, taxpayer	_____ [40]	
Municipality where owned, spouse	_____ [41]	

**NOTES/QUESTIONS:**



## Maryland General Information

**Taxpayer**

**Spouse**

County of residence \_\_\_\_\_ [1] \_\_\_\_\_ [2]  
 City of residence \_\_\_\_\_ [3]

### Contributions

**Amount of charitable contributions you wish to make to:**

Chesapeake Bay and Endangered Species Fund \_\_\_\_\_ [4]  
 Developmental Disabilities Waiting List Equity Fund \_\_\_\_\_ [5]  
 Maryland Cancer Fund \_\_\_\_\_ [6]  
 Fair Campaign Financing Fund \_\_\_\_\_ [7]

### Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Maryland**

Part-year residency dates:

From \_\_\_\_\_ [8]  
 To \_\_\_\_\_ [9]

State of legal residence (Other than Maryland) \_\_\_\_\_ [10]

If Maryland return filed for previous year, indicate type (Nonresident only) (1 = Resident, 2 = Nonresident) \_\_\_\_\_ [11]

Mark if taxpayer or spouse in military (Nonresident only) \_\_\_\_\_ [12]

**NOTES/QUESTIONS:**

**Massachusetts General Information**

Name has changed since last year \_\_\_\_\_ [1]  
 Noncustodial parent \_\_\_\_\_ [2]  
 In care of address or address of legal residence or domicile:  
 Street \_\_\_\_\_ [3]  
 City, state, zip code \_\_\_\_\_ [4] \_\_\_\_\_ [5] \_\_\_\_\_ [6]  
 Foreign country name \_\_\_\_\_ [7]  
 Foreign province or county \_\_\_\_\_ [8]  
 Foreign postal code \_\_\_\_\_ [9]

**Use Tax**

Estimate use tax for out of state purchases less than \$1,000 \_\_\_\_\_ [10]  
 Out of state purchases \_\_\_\_\_ [11] Sales tax paid to other state \_\_\_\_\_ [12]

**Contributions**

**Amount of political and charitable contributions you wish to make to:**

	<b>Taxpayer</b>	<b>Spouse</b>
Contribute to the State Election Campaign Fund	_____ [13]	_____ [14]
Organ Transplant Fund _____ [15]	United States Olympic Fund _____ [18]	
Endangered Wildlife Conservation _____ [16]	Military Family Relief Fund _____ [19]	
Public Health HIV and Hepatitis Fund _____ [17]	Homeless Animal Prevention and Care Fund _____ [20]	

**Adjustments and Deductions****Rental Deduction**

Residence #1 rented address \_\_\_\_\_ [21]  
 Landlord's name and address \_\_\_\_\_  
 Date from \_\_\_\_\_ Date to \_\_\_\_\_ Rent paid \_\_\_\_\_

Residence #2 rented address \_\_\_\_\_  
 Landlord's name and address \_\_\_\_\_  
 Date from \_\_\_\_\_ Date to \_\_\_\_\_ Rent paid \_\_\_\_\_

**Health Insurance Information**

	<b>Taxpayer</b>	<b>Spouse</b>
Enrolled in Minimum Creditable Coverage (MCC) health insurance plan for entire year _____ [22]		_____ [23]
Insurance information has changed from last year	Yes ___ [24] No ___ [25]	Yes ___ [26] No ___ [27]
Federal identification number _____ [28]		_____ [29]
Subscriber number _____ [30]		_____ [31]
Name of insurance company (Taxpayer) _____ [32]		_____ [32]
Name of insurance company (Spouse) _____ [33]		_____ [33]

**Commuter Deduction**

	<b>Tolls paid through Fastlane</b>	<b>MBTA Transit/commuter passes</b>
Taxpayer _____ [34]		_____ [34]
Spouse _____ [35]		_____ [35]

**Part-year Resident Information**

**If you were a part-year resident during the tax year, enter the dates you lived in Massachusetts**

Part-year residency dates:  
 From \_\_\_\_\_ [36]  
 To \_\_\_\_\_ [37]

## Michigan General Information

School district name		_____	[1]
School district code		_____	[2]
Mark if 2/3 income from seafaring		_____	[3]
	<b>Taxpayer</b>		<b>Spouse</b>
Do you want \$3.00 to go to the state campaign fund? (Y, N)		_____	[4]
Do you want \$3.00 to go to the state campaign fund? (Y, N)		_____	[5]
Mark the applicable boxes if the following conditions apply to you and/or your spouse:			
Paraplegic, quadriplegic or hemiplegic		_____	[6]
Totally and permanently disabled		_____	[8]
Deaf		_____	[10]
Qualified disabled veteran		_____	[12]
Willing to participate in the anatomical gift donor registry		_____	[14]
		_____	[7]
		_____	[9]
		_____	[11]
		_____	[13]
		_____	[15]

## Use Tax

Purchases up to \$1000 per purchase subject to use tax		_____	[16]
Purchases exceeding \$1000 per purchase subject to use tax		_____	[17]

## Contributions

**Amount of charitable contribution you wish to make to:**  
**Contributions must be a minimum of \$5, \$10 or any amount greater than \$10**

American Red Cross of Michigan		_____	[18]
Animal Welfare Fund		_____	[19]
Children's Trust Fund - Preventing Child Abuse in Michigan		_____	[20]
Military Family Relief Fund		_____	[21]
United Way Fund		_____	[22]

## Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Michigan**

	Taxpayer		Spouse
From	_____		_____
To	_____		_____
Residency status of spouse (If different from taxpayer)(1 = Resident, 2 = Nonresident, 3 = Part-year resident)			_____

**NOTES/QUESTIONS:**

## Michigan Credits - Homestead Property Tax Credit Information

### Homeowner

Homestead occupied entire tax year: Taxable value \_\_\_\_\_ [1] Special Assessments \_\_\_\_\_ [3]

Homestead property taxes levied, if different from that entered on Organizer Form ID: A1 (or Lite-5)

TSJ	Description	Amount
_____	_____	_____ [4]
_____	_____	_____

Address at end of tax year, if different from that entered on Organizer Form ID: 1040 (or Lite-1):

Street address _____ [5]	Taxable value _____ [9]
City _____ [6]	Number of days occupied _____ [10]
State _____ [7] Zip code _____ [8]	Property taxes levied for the year _____ [11]

Address of homestead sold during tax year:

Street address _____ [12]	Taxable value _____ [16]
City _____ [13]	Number of days occupied _____ [17]
State _____ [14] Zip code _____ [15]	Property taxes levied for the year _____ [18]

### Rental Information

Rental #1 Address _____ City _____ Zip code _____	No. months	Monthly rent	Mobile home
Landlord #1 Name _____ Address _____ City _____ State _____ Zip Code _____			
Rental #2 Address _____ City _____ Zip code _____	No. months	Monthly rent	Mobile home
Landlord #2 Name _____ Address _____ City _____ State _____ Zip Code _____			

### Household Income

**Enter amounts of nontaxable income received during the tax year by any member of your household**

Child support and foster parent payments	_____ [20]
Worker's compensation and Veteran's benefits	_____ [21]
Family Independence Agency and other public assistance payments	_____ [22]
Gifts or expenses paid on your behalf	_____ [23]
Other nontaxable income (inheritances, etc):	_____ [24]
_____	_____
_____	_____
_____	_____

**NOTES/QUESTIONS:**

## Michigan Cities General Information

**Taxpayer Spouse**

Mark the applicable boxes if the following conditions apply to you and/or your spouse:

Disabled

\_\_\_[1]

\_\_\_[2]

Deaf

\_\_\_[3]

\_\_\_[4]

---

**NOTES/QUESTIONS:**

## Minnesota General Information

Mark if you or your spouse are disabled \_\_\_\_\_ [1]  
 Welfare amounts received \_\_\_\_\_ [2]

### Contributions

**Amount of political and charitable contributions you wish to make to:**  
**Political Contributions**

State campaign fund (Enter the appropriate code for the \$5 political party contribution on Form M1 or Form M1PR from the list below) Taxpayer \_\_\_\_\_ [3] Spouse \_\_\_\_\_ [4]

#### Political Parties

<b>11 = Republican</b>	<b>14 = Grassroots-Legalize Cannabis</b>	<b>17 = Legalize Marijuana Now</b>
<b>12 = Democratic Farmer-Labor</b>	<b>16 = Libertarian</b>	<b>99 = General Campaign Fund</b>

### Charitable Contribution

Nongame Wildlife Fund \_\_\_\_\_ [5]

### Credits and Subtractions

#### Long Term Care Insurance Credit

Name of insurance company (Taxpayer) \_\_\_\_\_ [6]  
 Name of insurance company (Spouse) \_\_\_\_\_ [7]  
 Policy Number (Taxpayer) \_\_\_\_\_ [8]  
 Policy Number (Spouse) \_\_\_\_\_ [9]

#### K-12 Education Expenses

Child's Name	Grade	Class Fees	Indiv Fees	Textbook Material	Transport Costs	Hardware Software	Qualified Tuition
_____ [10]	_____ [11]	_____ [12]	_____ [13]	_____ [14]	_____ [15]	_____ [16]	_____ [17]
_____ [18]	_____ [19]	_____ [20]	_____ [21]	_____ [22]	_____ [23]	_____ [24]	_____ [25]
_____ [26]	_____ [27]	_____ [28]	_____ [29]	_____ [30]	_____ [31]	_____ [32]	_____ [33]

	Child One	Child Two	Child Three
Class name _____ [34]	_____ [35]	_____ [36]	
Class type _____ [37]	_____ [38]	_____ [39]	
Ind. instr name _____ [40]	_____ [41]	_____ [42]	
Ind. instr type _____ [43]	_____ [44]	_____ [45]	
Music ins type _____ [46]	_____ [47]	_____ [48]	
Musical ins cost _____ [49]	_____ [50]	_____ [51]	
Type of school attended _____ [52]	_____ [53]	_____ [54]	
Transp provider _____ [55]	_____ [56]	_____ [57]	

#### M1PR Property Tax Credit

**Note: Please attach copies of your tax year CRP's and/or current year Property Tax Statements**

### Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in Minnesota

	Taxpayer	Spouse
Part-year residency dates:		
From _____ [58]	_____ [60]	
To _____ [59]	_____ [61]	
Other state of residence (State/Foreign country required for other nonresidents) _____ [62]	_____ [63]	

**NOTES/QUESTIONS:**

### Mississippi General Information

County of residence \_\_\_\_\_ [1]

### Contributions

Amount of contributions you wish to make to:

- Military Family Relief Fund \_\_\_\_\_ [2]
- Commission for Volunteer Service Fund \_\_\_\_\_ [3]
- Wildlife Heritage Fund \_\_\_\_\_ [4]
- Educational Trust Fund \_\_\_\_\_ [5]
- Wildlife Fisheries and Parks Foundation \_\_\_\_\_ [6]
- Burn Care Fund \_\_\_\_\_ [7]

### NOTES/QUESTIONS:

## Missouri General Information

County of residence name \_\_\_\_\_ [1]  
 County of residence \_\_\_\_\_ [2]

## Contributions

**Amount of contributions you wish to make to:**

Children's Trust Fund \_\_\_\_\_ [3]  
 Veterans Trust Fund \_\_\_\_\_ [4]  
 Elderly Home Delivered Meals Trust Fund \_\_\_\_\_ [5]  
 Missouri National Guard Trust Fund \_\_\_\_\_ [6]  
 Workers' Memorial Trust Fund \_\_\_\_\_ [7]  
 Childhood Lead Testing Trust Fund \_\_\_\_\_ [8]  
 Missouri Military Family Relief Trust Fund \_\_\_\_\_ [9]  
 General Revenue Trust Fund \_\_\_\_\_ [10]  
 Organ Donor Program Trust Fund \_\_\_\_\_ [11]  
 Kansas City Regional Law Enforcement Memorial Foundation Trust Fund \_\_\_\_\_ [12]  
 Soldiers Memorial Military Museum in St. Louis Trust Fund \_\_\_\_\_ [13]  
 Metal of Honor Fund \_\_\_\_\_ [14]  
 Trust Fund \_\_\_\_\_ [15] \_\_\_\_\_ [16]  
 Trust Fund \_\_\_\_\_ [17] \_\_\_\_\_ [18]

### Trust Fund Codes

01 = American Cancer Society	08 = March of Dimes
02 = American Diabetes Association	09 = National Arthritis Foundation
03 = American Heart Association	10 = National Multiple Sclerosis Society
05 = ALS (Lou Gehrig's Disease)	18 = Pediatric Cancer Research Trust Fund
07 = Muscular Dystrophy Association	

## Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in Missouri

	Taxpayer	Spouse
Missouri residency dates:		
From _____	_____ [19]	_____ [20]
To _____	_____ [21]	_____ [22]
Other state residency dates:		
From _____	_____ [23]	_____ [24]
To _____	_____ [25]	_____ [26]
Other state of residency _____	_____ [27]	_____ [28]

If your reason for residence in Missouri was to serve in the military, enter Missouri place of station:

Taxpayer \_\_\_\_\_ [29]  
 Spouse \_\_\_\_\_ [30]

## Property Tax Information

**Residents only**

Mark if you are a 100% disabled veteran \_\_\_\_\_ [31]  
 Mark if you are disabled per section 135.010(2), RSMo \_\_\_\_\_ [32]  
 Mark if surviving spouse social security benefits were received during the tax year \_\_\_\_\_ [33]

**NOTES/QUESTIONS:**



## Montana Contributions

**Amount of contributions you wish to make to:**

	<b>Taxpayer</b>	<b>Spouse</b>
Nongame Wildlife Program	_____ [1]	_____ [2]
Child Abuse and Neglect Prevention Program	_____ [3]	_____ [4]
Agriculture in Montana Schools Program	_____ [5]	_____ [6]
Montana Military Family Relief Fund	_____ [7]	_____ [8]
Political Contributions	_____ [9]	_____ [10]

## Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Montana**

Part-year residency dates:

From \_\_\_\_\_ [11]  
 To \_\_\_\_\_ [12]

State moved to \_\_\_\_\_ [13]  
 State moved from \_\_\_\_\_ [14]

## Elderly Homeowner or Renter Credit

**Please provide copies of property tax bills**

Mark if owned or rented a Montana residence for 6 months or more during the current tax year \_\_\_\_\_ [15]  
 Taxpayer, Spouse, Joint \_\_\_\_\_ [16]  
 Rent paid \_\_\_\_\_ [17]

**NOTES/QUESTIONS:**

### Nebraska General Information

County of residence \_\_\_\_\_ [1]  
Public school district \_\_\_\_\_ [2]

### Contributions

Amount of charitable contributions you wish to make to:

Wildlife Conservation Fund \_\_\_\_\_ [3]

### Part-year Resident Information

If you were a part-year resident during the tax year, enter the dates you lived in Nebraska

Part-year residency dates:

From \_\_\_\_\_ [4]

To \_\_\_\_\_ [5]

**NOTES/QUESTIONS:**

**New Hampshire General Information**

	<b>Taxpayer</b>	<b>Spouse</b>
Mark if disabled on the last day of the tax year	___[1]	___[2]
		<b>DP-10</b>
Name change since last filing		___[3]

**Part-year Resident Information****If you were a part-year resident during the tax year, enter the dates you lived in New Hampshire**

From	_____	[4]
To	_____	[5]

**Business Tax Summary**

Mark to indicate final return \_\_\_\_\_[6]

**NOTES/QUESTIONS:**

## New Jersey General Information

County or Municipality code \_\_\_\_\_ [1]  
 In care of address \_\_\_\_\_ [2]  
 Mark if:  
 Tax forms, instructions and booklet are not needed \_\_\_\_\_ [3]  
 You are not eligible for the property tax deduction or credit \_\_\_\_\_ [4]  
 You maintain the same residence as your spouse (Married filing separate returns ONLY) \_\_\_\_\_ [5]

	Taxpayer	Spouse
Mark if: Contributed to the Social Security Fund (Eligible to receive benefits)	____ [6]	____ [7]
You want to designate \$1 to the gubernatorial election campaign fund	____ [8]	____ [9]

## Contributions

**Amount of contribution you wish to make to:**

Endangered Wildlife Fund	_____	[10]
Children's Trust Fund to prevent child abuse	_____	[11]
New Jersey Vietnam Veterans' Memorial Fund	_____	[12]
Breast Cancer Research Fund	_____	[13]
USS New Jersey Educational Museum Fund	_____	[14]
Other (see codes below)	_____ [15]	_____ [16]
Other (see codes below)	_____ [17]	_____ [18]
Other (see codes below)	_____ [19]	_____ [20]

### Other Funds

01 = Drug Abuse Education	08 = Veterans Haven Support	15 = Girl Scouts Council in NJ	22 = Non-Profit Veterans Org
02 = Korean Veterans'	09 = Community Food Pantry	16 = Homeless Veterans Grant	23 = NJ Yellow Ribbon
03 = Organ Donor	10 = Cat and Dog Spay and Neuter	17 = Leukemia and Lymphoma - NJ	24 = Autism Programs
04 = AIDS Services	11 = Lung Cancer Research	18 = North NJ Vet Memorial Cemetery	25 = Boy Scouts Councils in NJ
05 = Literacy Vol	12 = Boys and Girls Club	19 = NJ Farm to School / School Gardens	26 = NJ Memorial To War Veterans
06 = Prostate Cancer	13 = NJ National Guard State Family	20 = Local Library Support	27 = Jersey Fresh Program
07 = World Trade Center	14 = American Red Cross NJ	21 = ALS Association Support	28 = NJ World War II Vet's Memorial

## Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in New Jersey**

Part-year residency dates:  
 From \_\_\_\_\_ [21]  
 To \_\_\_\_\_ [22]  
 State of residency (Nonresidents only) \_\_\_\_\_ [23]

### NOTES/QUESTIONS:

## New Jersey Property Information

For principal residences owned or rented in New Jersey during the tax year, enter address information

### General Information

Principal residence for 2023 \_\_\_\_\_ [1]  
 Property tax credit not claimed with homestead benefit, claim on NJ-1040 \_\_\_\_\_ [2]

	Part 1	Part 2
Block number	_____ [3]	_____ [4]
Lot number	_____ [5]	_____ [6]
Qualifier number (Condos)		_____ [7]
Co-op or continuing care retirement facility resident		_____ [8]
Municipal code at the end of if different from current residence		_____ [9]

### Homeowner Information

Total property taxes paid \_\_\_\_\_ [10]  
 Street \_\_\_\_\_ [11]  
 City \_\_\_\_\_ [12]  
 Number of days as an owned property \_\_\_\_\_ [13]  
 Your share of property owned \_\_\_\_\_ [14]  
 Share used as principal residence \_\_\_\_\_ [15]  
 Your share of property taxes \_\_\_\_\_ [16]

### Renter and Mobile Home Owner Information

Total rent paid or mobile home fees \_\_\_\_\_ [17]  
 Street \_\_\_\_\_ [18]  
 Apartment number \_\_\_\_\_ [19]  
 City \_\_\_\_\_ [20]  
 Days you were a tenant during 2023 \_\_\_\_\_ [21]  
 Total number of tenants \_\_\_\_\_ [22]  
 Your share of rent paid \_\_\_\_\_ [23]

### Other Tenant Information

First name \_\_\_\_\_ [24]  
 Middle initial \_\_\_\_\_  
 Last name \_\_\_\_\_  
 Social security number \_\_\_\_\_

### Property Tax Reimbursements

	2022	2023
Taxpayer received social security disability	_____ [25]	_____ [26]
Spouse received social security disability	_____ [27]	_____ [28]
Meets the "Lived continuously in New Jersey" requirement		_____ [29]
Meets the "Owned and lived in the home" requirement		_____ [30]
You are a mobile home owner		_____ [31]
Mobile home park site number		_____ [32]
Taxpayer needs a PTR-A or PTR-B to take tax collector/mobile home part owner or manager to verify taxes paid		_____ [33]

**NOTES/QUESTIONS:**

**New Mexico General Information**

If you were a part-year resident during the tax year, enter the dates you lived in New Mexico

First year resident \_\_\_\_\_[1]

From To

Part-year residency dates:

Taxpayer \_\_\_\_\_[2] \_\_\_\_\_[3]

Spouse \_\_\_\_\_[4] \_\_\_\_\_[5]

Do NOT have a commercial domicile in New Mexico \_\_\_\_\_[6]

**Contributions****Amount of political and charitable contributions you wish to make to:  
Political Contributions**

Political party (1 = Democratic, 2 = Republican, 3 = Libertarian, 4 = Green, 5 = Better for America, 6 = Constitution)

Taxpayer  
\_\_\_\_\_[7]Spouse  
\_\_\_\_\_[8]**Charitable Contributions**

New Mexico Housing Trust Fund \_\_\_\_\_[9]

Share with Wildlife \_\_\_\_\_[10]

Veterans' State Cemetery Fund \_\_\_\_\_[11]

Substance Abuse Education Fund \_\_\_\_\_[12]

Forest Re-Leaf Program \_\_\_\_\_[13]

National Guard Member and Family Assistance \_\_\_\_\_[14]

Kids 'N Parks Transportation Grant Program \_\_\_\_\_[15]

Amyotrophic Lateral Sclerosis Research Fund \_\_\_\_\_[16]

Vietnam Veterans Memorial \_\_\_\_\_[17]

Veterans Enterprise Fund \_\_\_\_\_[18]

Lottery Tuition Fund \_\_\_\_\_[19]

Equine Shelter Rescue Fund \_\_\_\_\_[20]

Animal Care and Facility Fund \_\_\_\_\_[21]

Supplemental Senior Services \_\_\_\_\_[22]

Healthy Soil Program \_\_\_\_\_[23]

**Additions and Deductions**

Income of an Indian \_\_\_\_\_[24]

Name of the taxpayer's Indian nation, tribe, or pueblo \_\_\_\_\_[25]

Name of the spouse's Indian nation, tribe, or pueblo \_\_\_\_\_[26]

Contributions refunded from the New Mexico approved Section 529 College Savings Plan \_\_\_\_\_[27]

**Rebate and Credit Schedule**

Public assistance, AFDC, welfare benefits \_\_\_\_\_[28]

Supplemental security income (SSI) \_\_\_\_\_[29]

Amount of rent paid during the tax year on principal place of residence \_\_\_\_\_[30]

Mark if rent includes amount paid on your behalf by a government entity \_\_\_\_\_[31]

Resident county (1 = Los Alamos, 2 = Santa Fe) \_\_\_\_\_[32]

**NOTES/QUESTIONS:**

## New York General Information

If you received unemployment benefits or any of the special unemployment compensation authorized under the Coronavirus Relief Act, both are taxable income and must be reported on your return. You may need to go to the New York Department of Labor's website ([labor.ny.gov](http://labor.ny.gov)) to get your 1099-G from your account. The 1099-G should show both the amount received and any amount of tax withheld.

	Taxpayer	Spouse
Mark if you were a resident of New York City at any time during the current tax year	___[1]	___[2]
Mark if you were a resident of Yonkers at any time during the current tax year	___[3]	___[4]
County of residence	_____ [5]	
School district	_____ [6]	

### Use Tax

Use tax due but receipts or records not available \_\_\_\_\_[7]

### Contributions

#### Amount of contributions you wish to make to:

Return a Gift to Wildlife	_____ [8]	Military Family Fund	_____ [25]
Missing or Exploited Children Clearinghouse Fund	_____ [9]	CUNY Fund	_____ [26]
Breast Cancer Research and Education Fund	_____ [10]	Life Pass it on Fund	_____ [27]
Alzheimer's Disease Fund	_____ [11]	ALS Research Fund	_____ [28]
Olympic Fund (Maximum \$2 per filer)	_____ [12]	School-based Health Centers	_____ [29]
Prostate and Testicular Cancer Research and Education Fund	_____ [13]	Gifts to Food Banks Fund	_____ [30]
9/11 Memorial	_____ [14]	Meals on Wheels for Seniors	_____ [31]
Volunteer Firefighting and EMS Recruitment Fund	_____ [15]	Gifts to the Arts Fund	_____ [32]
Teen Health Education Fund	_____ [16]	Leukemia, Lymphoma, and Myeloma Fund	_____ [33]
Veterans Remembrance and Cemetery Fund	_____ [17]	State Campaign Finance Fund (Maximum \$40 per filer)	_____ [34]
Homeless Veterans Assistance Fund	_____ [18]	William B. Hoyt memorial children family trust fund	_____ [35]
Mental Illness Anti-Stigma Fund	_____ [19]	Gun violence research fund	_____ [36]
Women's Cancers Education and Prevention Fund	_____ [20]	Substance use disorder education and recovery fund	_____ [37]
Autism Awareness and Research Fund	_____ [21]	Retired and Rescued Thoroughbred Horse Aftercare	_____ [38]
Veterans' Homes Assistance Fund	_____ [22]	Retired and Rescued Standardbred Horse Aftercare	_____ [39]
Love Your Library Fund	_____ [23]	Gifts for the State Library System	_____ [40]
Lupus Fund	_____ [24]	Gift for Lyme and Tick-Bourne Diseases	_____ [41]

### Property Tax Credit Information

Resident who lived six or more months in same taxable residence with market value \$85,000 or less

Mark if you lived in a nursing home and qualify for credit \_\_\_\_\_[42]

Enter amounts received for cash public assistance and relief \_\_\_\_\_[43]

Enter any other income not reported elsewhere \_\_\_\_\_[44]

Homeowners: \_\_\_\_\_[45]

Enter the amount of special assessments you and all qualified household members paid during the current tax year

Enter the amount of taxes not paid due to the exemption for persons 65 or older under section 467 \_\_\_\_\_[46]

Tenants: \_\_\_\_\_[47]

Enter the total rent you and all members of your household paid during current tax year

Rent includes charges for (Specify) \_\_\_\_\_[48]

4 = Heat, gas, electricity, furnishings and board

2 = Heat, gas and electricity

0 = Nothing included

3 = Heat, gas, electricity and furnishings

1 = Heat or heat and gas

\_\_\_\_\_ [49]

### NOTES/QUESTIONS:

**New York - Part-year Resident and Nonresident Information**

	Taxpayer			Spouse	
	New York State	New York City	Yonkers	New York City	Yonkers
Part-year residency dates:					
From	_____ [1]	_____ [3]	_____ [5]	_____ [7]	_____ [9]
To	_____ [2]	_____ [4]	_____ [6]	_____ [8]	_____ [10]
County of residence while a nonresident of New York City		_____ [11]		_____ [12]	

**Nonresident Information for Apartment or Living Quarters Maintained in the State/City**

Address #1

Mark if this address is still maintained by or for you \_\_\_\_\_ [13]

Number of days in NYC \_\_\_\_\_

Street address \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Is this address within city limits? Specify city (YON = Yonkers, NYC = New York City) \_\_\_\_\_

Address #2

Mark if this address is still maintained by or for you \_\_\_\_\_

Number of days in NYC \_\_\_\_\_

Street address \_\_\_\_\_

City, State and Zip code \_\_\_\_\_

Is this address within city limits? Specify city (YON = Yonkers, NYC = New York City) \_\_\_\_\_

**NOTES/QUESTIONS:**



### North Carolina General Information

County of residence \_\_\_\_\_ [1]

### Contributions

Amount of charitable contributions you wish to make to:

Endangered Wildlife Fund \_\_\_\_\_ [2]

Education Endowment Fund \_\_\_\_\_ [3]

Breast and Cervical Cancer Control Program \_\_\_\_\_ [4]

### Part-year Resident Information

If you were a part-year resident during the tax year, enter the dates you lived in North Carolina

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [5]	_____ [7]
To	_____ [6]	_____ [8]

**NOTES/QUESTIONS:**

## North Dakota General Information

School district code \_\_\_\_\_ [1]  
 Income source code \_\_\_\_\_ [2]

### Income source code

1 = Farming, ranching	4 = Public, private education	7 = Manufacturing	10 = Finance, banking, insur
2 = Retail, wholesale trade	5 = Personal, business services	8 = Communication, trnspn, utilities	11 = Military
3 = Government service	6 = Construction	9 = Gas, oil, coal	12 = Retirement

## Contributions

Amount of contributions you wish to make to:

Watchable Wildlife Fund \_\_\_\_\_ [3]  
 Trees for North Dakota Fund \_\_\_\_\_ [4]  
 Veterans Postwar Trust Fund \_\_\_\_\_ [5]

## Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in North Dakota

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [6]	_____ [8]
To	_____ [7]	_____ [9]
Other state of residency	_____ [10]	_____ [11]

**NOTES/QUESTIONS:**

## Ohio General Information

Enter your current Ohio county of residence \_\_\_\_\_ [1]  
 School district number \_\_\_\_\_ [2]

### Use Tax

Purchases subject to use tax \_\_\_\_\_ [3]

### Contributions

#### Amount of charitable contributions you wish to make to:

Military injury relief fund \_\_\_\_\_ [4]  
 Nature preserves and scenic rivers \_\_\_\_\_ [5]  
 Wildlife species and endangered wildlife \_\_\_\_\_ [6]  
 Ohio History Fund \_\_\_\_\_ [7]  
 Breast and cervical cancer project \_\_\_\_\_ [8]  
 Wishes for sick children \_\_\_\_\_ [9]

### Credits

	Taxpayer	Spouse
Displaced worker training expenses for 12-month period since loss of job	_____ [10]	_____ [11]

### Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in Ohio

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [12]	_____ [14]
To	_____ [13]	_____ [15]

	Taxpayer	Spouse
Residency status (If taxpayer and spouse are different) (R = Resident, P = Part-year resident, N = Nonresident)	_____ [16]	_____ [17]
State of residency while not a resident of Ohio	_____ [18]	_____ [19]
If foreign, enter country of residency	_____ [20]	_____ [21]

**NOTES/QUESTIONS:**

Mark if not subject to Use Tax \_\_\_\_\_[1]

**Contributions**

**Amount of charitable contributions you wish to make to:**

Court Appointed Advocates \_\_\_\_\_[2]  
 YMCA Youth and Government Program \_\_\_\_\_[3]  
 Wildlife Diversity Fund \_\_\_\_\_[4]  
 Silver Haired Legislature and Alumni Association \_\_\_\_\_[5]

**Part-year Resident and Nonresident Information**

**If you were a part-year resident during the tax year, enter the dates you lived in Oklahoma**

Part-year residency dates:  
 From \_\_\_\_\_[6]  
 To \_\_\_\_\_[7]  
 Nonresident state of residence \_\_\_\_\_[8] Nonresident country of residence \_\_\_\_\_[9]

Resident and part-year or nonresident spouse:

**Taxpayer's residence**

**Spouse's residence**

State postal code	[10]	Country code	[11]	State postal code	[12]	Country code	[13]
State postal code		Country code		State postal code		Country code	
State postal code		Country code		State postal code		Country code	
State postal code		Country code		State postal code		Country code	

**Property Tax and Sales Tax Credits**

Mark if you were not an Oklahoma resident for the entire tax year \_\_\_\_\_[14]  
 Mark if you (or spouse) were disabled for the entire tax year \_\_\_\_\_[15]  
 Home real estate tax \_\_\_\_\_[16]  
 Workmen's compensation/loss of time insurance \_\_\_\_\_[17]  
 Support money \_\_\_\_\_[18]  
 Cash public assistance \_\_\_\_\_[19]

**NOTES/QUESTIONS:**

## Oregon General Information

Indicate if severely disabled (T = Taxpayer, S = Spouse, B = Both)

	_____ [1]
<b>Taxpayer</b>	<b>Spouse</b>
_____ [2]	_____ [3]
_____ [4]	_____ [5]

Number of months of federal service before 10/01/1991 (Federal employees)

Total number of months of federal service (Federal employees)

## Contributions

### Amount of charitable contributions you wish to make to:

Cascade AIDS Project _____ [6]	Oregon Humane Society _____ [21]
Veterans Suicide Prevention _____ [7]	The Salvation Army _____ [22]
Oregon Non-game Wildlife _____ [8]	Doernbecher Children's Hospital _____ [23]
Prevent Child Abuse _____ [9]	Oregon Veteran's Home _____ [24]
Alzheimer's Disease Research _____ [10]	ALS Association _____ [25]
Stop Domestic and Sexual Violence _____ [11]	Planned Parenthood _____ [26]
Habitat for Humanity _____ [12]	Lions Sight & Hearing Foundation _____ [27]
Head Start Association _____ [13]	Shriners Hospitals for Children _____ [28]
American Diabetes Association _____ [14]	Special Olympics _____ [29]
SMART - Start Making A Reader Today _____ [15]	Military Assistance Program _____ [30]
Oregon Coast Aquarium _____ [16]	Historical Society _____ [31]
SOLVE - Stop Oregon Litter and Vandalism _____ [17]	Food Bank _____ [32]
The Nature Conservancy _____ [18]	Albertina Kerr Kid's Crisis Care _____ [33]
St. Vincent DePaul Society of Oregon _____ [19]	American Red Cross _____ [34]
Girl Scouts of Oregon & SW Washington _____ [20]	

### Political party you wish to make contributions to:

	_____ [35]
<b>Political Party</b>	<b>Spouse</b>
	_____ [36]

### Political Party Contributions

500 = Constitution Party of Oregon	503 = Libertarian Party of Oregon	506 = Progressive Party
501 = Democratic Party of Oregon	504 = Oregon Republican Party	507 = Working Families Party of Oregon
502 = Independent Party of Oregon	505 = Pacific Green Party of Oregon	508 = No Labels Party

## Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in Oregon

	<b>Taxpayer</b>	<b>Spouse</b>
Dates of residency:		
From	_____ [37]	_____ [39]
To	_____ [38]	_____ [40]

**NOTES/QUESTIONS:**

## Pennsylvania General Information

County of residence \_\_\_\_\_ [1]  
 School district name \_\_\_\_\_ [2]

Final return \_\_\_\_\_ [3] **Taxpayer** \_\_\_\_\_ [4] **Spouse**

### Contributions

Amount of contributions you wish to make to:

	Taxpayer	Spouse
Breast and Cervical Cancer	_____ [5]	_____ [6]
Wild Resource Conservation Fund	_____ [7]	_____ [8]
Military Family Relief Assistance	_____ [9]	_____ [10]
Governor Robert P. Casey Memorial Organ/Tissue Trust Fund	_____ [11]	_____ [12]
Juvenile (Type 1) Diabetes Cure Research Fund	_____ [13]	_____ [14]
Children's Trust Fund	_____ [15]	_____ [16]
American Red Cross	_____ [17]	_____ [18]
Pediatric Cancer Research Fund	_____ [19]	_____ [20]
Veterans' Trust Fund	_____ [21]	_____ [22]

### Part-year Resident Information

If you were a part-year resident during the tax year, enter the dates you lived in Pennsylvania

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [23]	_____ [25]
To	_____ [24]	_____ [26]

**NOTES/QUESTIONS:**

**Rhode Island General Information**

Enter city or town of legal residence \_\_\_\_\_ [1]

**Use Tax**

Purchases subject to use tax \_\_\_\_\_ [2]

Total sales tax paid to other states \_\_\_\_\_ [3]

Purchases subject to use tax is unknown except purchases greater than or equal to \$1,000 (Use tax table based on federal AGI) \_\_\_\_\_ [4]

Purchases subject to use tax greater than or equal to \$1,000:

Description	Purchases Subject to Use or sales Tax [5]	Sales Tax Paid to Other State
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Contributions****Amount of political and charitable contributions you wish to make to:****Political Contributions**

Mark to make an electoral system contribution (NOTE: This will NOT increase your tax or decrease your refund) \_\_\_\_\_ [6]

If you wish for a portion of your electoral contribution to be paid to a political party, enter name of party \_\_\_\_\_ [7]

**Charitable Contributions**

Drug Program Account \_\_\_\_\_ [8]

Mark if you wish to make an Olympic Contribution \_\_\_\_\_ [9]

Organ Transplant Fund \_\_\_\_\_ [10]

Council on the Arts \_\_\_\_\_ [11]

Nongame Wildlife Fund \_\_\_\_\_ [12]

Childhood Disease Victims' Fund \_\_\_\_\_ [13]

Military Family Relief Fund \_\_\_\_\_ [14]

**Part-year Resident Information**

Part-year residency dates:

From \_\_\_\_\_ [15]

To \_\_\_\_\_ [16]

**Property Tax Relief Claim**

Mark if disabled and received social security disability payments during the tax year \_\_\_\_\_ [17]

Live in household or rent dwelling subject to property tax? (Y, N) \_\_\_\_\_ [18]

Current for property taxes and rent due for 2023 and all prior years (Y, N) \_\_\_\_\_ [19]

Rent paid (Enter 100%) \_\_\_\_\_ [20]

If renting, Landlord name: \_\_\_\_\_ [21]

Landlord Address: \_\_\_\_\_ [22]

Landlord city, state and zip code \_\_\_\_\_ [23] \_\_\_\_\_ [24] \_\_\_\_\_ [25]

Landlord phone number: \_\_\_\_\_ [26]

**NOTES/QUESTIONS:**

## South Carolina General Information

County code number, if known \_\_\_\_\_ [1]  
 Authorize discussion with Department of Revenue (Y, N) \_\_\_\_\_ [2]  
 Purchases subject to use tax \_\_\_\_\_ [3]

### Additions and Subtractions

Expenses related to reserve income \_\_\_\_\_ [4]  
 National guard reserve pay \_\_\_\_\_ [5]  
 Law enforcement subsistence (Number of days) \_\_\_\_\_ [6]  
 Volunteer deduction code \_\_\_\_\_ [7]  
     Taxpayer \_\_\_\_\_ [7]  
     Spouse \_\_\_\_\_ [8]

Volunteer Deduction Codes	
1 = Volunteer Firefighter	5 = Reserve Police officer
2 = HAZMAT team member	6 = State Guard member
3 = Rescue Squad worker	7 = State Constable
4 = DNR officer	

### Part-year Resident and Nonresident Information

If you were a part-year resident during the tax year, enter the dates you lived in South Carolina

Part-year residency dates:  
 From \_\_\_\_\_ [9]  
 To \_\_\_\_\_ [10]

### Contributions

Amount of contributions you wish to make to:

Endangered Wildlife Fund \_\_\_\_\_ [11]  
 Children's Trust Fund \_\_\_\_\_ [12]  
 Eldercare Trust Fund \_\_\_\_\_ [13]  
 Veterans' Trust Fund \_\_\_\_\_ [14]  
 Donate Life South Carolina \_\_\_\_\_ [15]  
 First Steps to School Readiness Fund \_\_\_\_\_ [16]  
 War Between States Heritage Trust Fund \_\_\_\_\_ [17]  
 Litter Control Enforcement Program \_\_\_\_\_ [18]  
 Law Enforcement Assistance Program \_\_\_\_\_ [19]  
 K-12 Public Education Fund \_\_\_\_\_ [20]  
 State Parks Fund \_\_\_\_\_ [21]  
 Military Family Relief Fund \_\_\_\_\_ [22]  
 Conservation Bank Trust Fund \_\_\_\_\_ [23]  
 Financial Literacy Trust Fund \_\_\_\_\_ [24]  
 State Forests Fund \_\_\_\_\_ [25]  
 Department of Natural Resources Fund \_\_\_\_\_ [26]  
 Association of Habitat Affiliates \_\_\_\_\_ [27]  
 SC Department of Archives and History \_\_\_\_\_ [28]

### NOTES/QUESTIONS:



## Tennessee General Information

County \_\_\_\_\_ [1]

City \_\_\_\_\_ [2]

Account number \_\_\_\_\_ [3]

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### NOTES/QUESTIONS:

## Utah General Information

**If you were a part-year resident during the tax year, enter the dates you lived in Utah**

Part-year residency dates:

From \_\_\_\_\_ [1]

To \_\_\_\_\_ [2]

State of residency (Nonresidents) \_\_\_\_\_ [3]

### Use Tax

County/City \_\_\_\_\_ Purchases \_\_\_\_\_ [4]

### Contributions

**Amount of political and charitable contributions you wish to make to:**

#### Political Contributions

Election campaign fund

Taxpayer \_\_\_\_\_ [5]      Spouse \_\_\_\_\_ [6]

Enter the appropriate code for the political party from the list below:

Political Party	
B = No Labels	M = Independent American
C = Constitution	R = Republican
D = Democratic	N = No Contribution
L = Libertarian	U = United Utah

Making a selection from this list will designate \$2 to the party of your choice. Your refund or amount of tax due will not be affected

#### Charitable Contributions

Pamela Atkinson Homeless Trust Account \_\_\_\_\_ [7]

Kurt Oscarson Children's Organ Transplant Account \_\_\_\_\_ [8]

School district code \_\_\_\_\_ [9]

School District and Nonprofit School District Foundation \_\_\_\_\_ [10]

#### School district code

01 = Alpine	07 = Davis	13 = Iron	19 = Morgan	25 = Park City	31 = Sevier	37 = Wasatch
02 = Beaver	08 = Duchesne	14 = Jordan	20 = Murray	26 = Piute	32 = S. Sanpete	38 = Washington
03 = Box Elder	09 = Emery	15 = Juab	21 = Nebo	27 = Provo	33 = S. Summit	39 = Wayne
04 = Cache	10 = Garfield	16 = Kane	22 = North Sanpete	28 = Rich	34 = Tintic	40 = Weber
05 = Carbon	11 = Grand	17 = Logan	23 = North Summit	29 = Salt Lake City	35 = Tooele	41 = Utah Assistive Technology
06 = Daggett	12 = Granite	18 = Millard	24 = Ogden	30 = San Juan	36 = Uintah	42 = Canyons

Clean Air Fund \_\_\_\_\_ [11]

Governor's Suicide Prevention Fund \_\_\_\_\_ [12]

**NOTES/QUESTIONS:**

## Vermont General Information

School district name \_\_\_\_\_ [1]  
 School district code \_\_\_\_\_ [2]

## Contributions and Use Tax

### Use Tax

Calculate use tax using the reporting table \_\_\_\_\_ [3]  
 Total out-of-state purchases for items that cost less than \$1,000 \_\_\_\_\_ [4]  
 Total out-of-state purchases for items that cost \$1,000 or more \_\_\_\_\_ [5]  
 Sales tax paid on out-of-state purchases \_\_\_\_\_ [6]

### Contributions

**Amount of charitable contributions you wish to make to:**

Nongame Wildlife Fund \_\_\_\_\_ [7]  
 Children's Trust Fund \_\_\_\_\_ [8]  
 Vermont Veterans' Fund \_\_\_\_\_ [9]  
 Green Up Day Vermont \_\_\_\_\_ [10]

## Part-year Resident and Nonresident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Vermont**

Part-year residency dates:  
 From \_\_\_\_\_ [11]  
 To \_\_\_\_\_ [12]  
 Other state of residency \_\_\_\_\_ [13]

## Property Tax Information

### Homeowners

Anticipate selling Vermont housesite on or before April 1st \_\_\_\_\_ [14]  
 SPAN number from 2023/2024 property tax bill \_\_\_\_\_ [15]  
 Housesite value \_\_\_\_\_ [16]  
 Housesite education tax \_\_\_\_\_ [17]  
 Housesite municipal tax \_\_\_\_\_ [18]  
 Ownership percentage of property \_\_\_\_\_ [19]  
 Mobile home lot rent \_\_\_\_\_ [20]

**NOTES/QUESTIONS:**

## Virginia General Information

Virginia city or county of residence on January 1, 2024; last lived in or business location \_\_\_\_\_ [1]  
 Mark to indicate 1099-G to be received electronically \_\_\_\_\_ [2]  
 Mark to indicate name has changed from last year (Resident and nonresident only) \_\_\_\_\_ [3]  
 Mark to indicate filing status has changed from last year (Resident only) \_\_\_\_\_ [4]  
 Mark to indicate address has changed from last year (Resident and nonresident only) \_\_\_\_\_ [5]  
 Mark to indicate that a Virginia return was not filed last year (Resident only) \_\_\_\_\_ [6]

	Taxpayer	Spouse
Identity theft PIN _____	[7]	[8]
Health care coverage contact information (1 = Email, 2 = Daytime phone, 3 = Mailing address, 4 = Address, if different) _____	[9]	[10]
Address, if different _____		[11]
City, state, zip code _____	[12]	[13]

### Use Tax

Consumer's Use Tax \_\_\_\_\_ [15]

## Contributions

### Amount of charitable contributions you wish to make to:

**If you contributed to a public school foundation, provide the supporting information to your accountant**

Virginia Nongame and Endangered Wildlife Program _____ [16]	Virginia Cancer Centers _____ [24]
Virginia Housing Program _____ [17]	Federation of Food Banks _____ [25]
Department for Aging and Rehabilitative Services _____ [18]	Chesapeake Bay Restoration Fund _____ [26]
Virginia Arts Foundation _____ [19]	Family and Children's Trust Fund (FACT) _____ [27]
Open Space Recreation and Conservation _____ [20]	Virginia's State Forests Fund _____ [28]
Children of America Finding Hope _____ [21]	Virginia Military Family Relief Fund _____ [29]
Virginia Federation of Humane Societies _____ [22]	Virginia Democratic Political Party _____ [30]
Spay and Neuter Fund _____ [23]	Virginia Republican Political Party _____ [31]

## Part-year Resident Information

**If you were a part-year resident during the tax year, enter the dates you lived in Virginia**

	Spouse	Taxpayer
Part-year residency dates:		
From _____	[32]	[34]
To _____	[33]	[35]

## Nonresident Information

	Spouse	Taxpayer
State of residence (Nonresidents only) _____	[36]	[37]

**NOTES/QUESTIONS:**

**West Virginia General Information**

County of residence \_\_\_\_\_ [1]  
 Notice received for mandatory electronic payments \_\_\_\_\_ [2]

**Use Tax**

Purchases \_\_\_\_\_ [3]

	<b>Municipality</b>	<b>Purchases</b>
Municipality purchases	_____	_____ [4]
Municipality purchases	_____	_____

**Contributions****Amount of contributions you wish to make to:**

West Virginia Children's Trust Fund \_\_\_\_\_ [5]  
 West Virginia Department of Veterans Assistance \_\_\_\_\_ [6]  
 Donel C. Kinnard Memorial State Veterans Cemetery \_\_\_\_\_ [7]

**Part-year Resident and Nonresident Information**

Part-year residency status \_\_\_\_\_ [8]

1 = Moved into West Virginia

2 = Moved out of West Virginia with West Virginia source income during period of nonresidency

3 = Moved out of West Virginia with no West Virginia source income during period of nonresidency

**If you were a part-year resident during the tax year, enter the dates you lived in West Virginia**

Part-year residency dates:

From \_\_\_\_\_ [9]

To \_\_\_\_\_ [10]

State of residence \_\_\_\_\_ [11]

If state of residence is Virginia or Pennsylvania, enter number of days in West Virginia (Nonresidents only) \_\_\_\_\_ [12]

**NOTES/QUESTIONS:**

## Wisconsin General Information

City of residence \_\_\_\_\_ [1]  
 Village of residence \_\_\_\_\_ [2]  
 Town of residence \_\_\_\_\_ [3]  
 County of residence \_\_\_\_\_ [4]  
 School district \_\_\_\_\_ [5]  
 Mark if divorce decree \_\_\_\_\_ [6]  
 Enter rent paid:  
   Heat included \_\_\_\_\_ [7]  
   Heat not included \_\_\_\_\_ [8]

## Use Tax

Mark if not subject to Use Tax \_\_\_\_\_ [9]

	County	Purchases
Sales and use tax on out-of-state purchases	_____	_____ [10]
Sales and use tax on out-of-state purchases	_____	_____
Sales and use tax on out-of-state purchases	_____	_____

## Contributions

### Amount of charitable contributions you wish to make to:

Cancer research	_____ [11]	Red Cross WI disaster relief	_____ [15]
Endangered resources	_____ [12]	Second Harvest / Feeding America	_____ [16]
Military family relief	_____ [13]	Special Olympics Wisconsin	_____ [17]
Multiple sclerosis	_____ [14]	Veterans trust fund	_____ [18]

## Part-year Resident and Nonresident Information

Residency code \_\_\_\_\_ [19]

### Residency code

<b>Blank = Both spouses have the same residency status (Default)</b> <b>1 = Taxpayer nonresident, spouse resident</b> <b>2 = Taxpayer resident, spouse nonresident</b> <b>3 = Taxpayer part-year, spouse nonresident</b>	<b>4 = Taxpayer nonresident, spouse part-year</b> <b>5 = Taxpayer resident, spouse part-year</b> <b>6 = Taxpayer part-year, spouse resident</b>
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If you were a part-year resident during the tax year, enter the dates you lived in Wisconsin

	Taxpayer	Spouse
Part-year residency dates:		
From	_____ [20]	_____ [22]
To	_____ [21]	_____ [23]
State of residency (Nonresidents only)	_____ [24]	_____ [25]
Country of residency (Nonresidents only)	_____ [26]	_____ [27]
Nonresident aliens:		
Taxpayer or Spouse is a U.S. citizen or a resident alien		_____ [28]
Resident of:	IL _____ [29]	IN _____ [30]
	KY _____ [31]	MI _____ [32]

## NOTES/QUESTIONS: