

<h1 style="margin: 0;">Form 1040</h1> <h2 style="margin: 0;">2023 Tax Organizer</h2> <p style="margin: 0;">With Schedules <u>A</u> (itemize), <u>B</u> (interest-Dividends) & <u>D</u> (Capital Gains)</p>
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Name _____
 Tel # _____ (Cell) DOB ____ / ____ / ____
 Spouse _____
 Tel # _____ (Cell) DOB ____ / ____ / ____
 Address _____
 E-mail(s) _____

Dependents

<u>First & last name</u>	<u>Social-security</u>	<u>Date of Birth</u>	<u>Relationship</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income (1 copy needed of below forms – mailed, scanned or faxed is ok but form must be legible)
W-2 1099-R 1099-MISC 1099-G 1099-INT 1099-SSA 1099-DIV
Schedule K-1 for S-Corporation (1120S) and/or Partnership (1065)

Alimony **Received** _____, Likely reported with your SSN by payer

Adjusted Gross Income

Educator Expenses _____, this deduction is for teachers only
 IRA Reg Roth _____ IRA (spouse) Reg Roth _____
 SEP, SIMPLE IRA _____
 Student Loan Interest _____ Tuition & Fees _____
 Education Expenses _____, indicate for whom _____
 Alimony **Paid** _____, Recipient's SSN _____
 Health Savings Act. _____, (from Form 8889) (above recipient's name)
 Health Insurance Paid _____, (self-employed only)

In 2023 anyone who has health insurance on the health care marketplace will receive a 1095-A. Please make sure to include this form with your tax documents. This too will delay your tax refund if we don't receive this from you. You can find a copy in your account at www.healthcare.gov or www.coverme.gov if you live in Maine.

Interest (1 copy needed of each interest and dividend statement received from bank, etc.)

[Do not overlook interest paid to you by U.S. Treasury on overdue tax refunds]

Interest \$ _____ FSJ Bank _____
 Interest \$ _____ FSJ Bank _____

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Itemized (Schedule A)

Prescriptions \$ _____	Doctors, Dentists \$ _____
Healthcare/Hospitals \$ _____	Mileage (medical) _____
Health Insurance Paid \$ _____	
Real estate tax (home) \$ _____	Real estate (other) \$ _____
Property (Excise) Tax \$ _____	Sales Tax (big items) \$ _____

Home Mortgage* Interest \$ _____	*requires copy of form 1098 from bank
Home Mortgage* Interest \$ _____	(if private) lender's name, address & SSN
Home Mortgage Points \$ _____	Home Equity Interest* \$ _____
Contributions (Cash) \$ _____	(Any one donation on 1 day of \$250 or more requires letter)
Contributions (property) \$ _____	(Any donation over \$250 or over \$500 requires documents)
Casualty & Theft \$ _____	Mileage (charity) _____
	List losses (requires Form 4684)

Capital Gains & Losses (Schedule D)

Include your form 1099-B. This will have **the** description, date purchased, date sold, sales price &, purchase price.

Tax Credits

Child & Dependent Care \$ _____	Name of Child _____
Name of Provider _____	& Address _____
Provider SSN / EIN _____	& Town, State, Zip _____
Education Credits _____, from Form 8863	

Payments

Estimated payments made for this tax year (Federal)	\$ _____
Estimated payments made for this tax year (State* _____)	\$ _____
Payment made with extension (Federal)	\$ _____
Payment made with extension (State* specify _____)	\$ _____
Carried over from preceding year (Federal)	\$ _____
Carried over from preceding year (State * specify _____)	\$ _____

Refunds

(joint returns require both filers on the same bank account)

(For direct deposit, enter Routing # _____
Account # _____)

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Mail to Taxing Situations, Inc., 515 Cobbs Bridge Road, New Gloucester, ME 04260,
FAX to (207) 657-8145 or attach as an e-mail to Shannon@Taxingsituations.com