

P | 260.484.1673 F | 260.484.1724 www.protaxwma.com

2023 TAX ORGANIZER

Name: Spouse Phone: Spouse Phone: Spouse Phone: Spouse Email: Spouse Email: Spouse Email: Spouse Cocupation: Spouse Occupation: Spouse Occupation: Spouse DOB: SSN: Spouse DOB: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: SSN: Spouse SSN: SSN: SSN: Spouse SSN: SSN: Spouse SSN: SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: SSN: SSN: Spouse SSN: SSN: SSN: SSN: SSN: SSN: Spouse SSN: SSN: SSN: SSN: SSN: SSN: Spouse SSN: SSN: SSN: SSN: SSN: SSN: SSN: SSN	Phone: SECTION 2—STATEMENTS AND FORMS (Attach those statements from payers.) Wages (W-2, 1099-NEC, 1099-MISC) Interests & Dividends (Bank or brokerage statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K	pouse Phone:		
Phone: Spouse Phone: Email: Spouse Email: Occupation: Spouse Dos: Spouse Dos: Spouse Dos: Spouse Dos: Spouse Dos: Spouse Dos: Spouse SSN:	Phone: SECTION 2—STATEMENTS AND FORMS (Attach those statements from payers.) Wages (W-2, 1099-NEC, 1099-MISC) Interests & Dividends (Bank or brokerage statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K	pouse Phone:		
Email: Spouse Date: Spouse Occupation: Spouse DobB: Spouse DobB: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: SSN: Spouse SSN: Spouse SSN: SSN: Spous	Email:	pouse Occupation:		
DOB: Spouse DOB: SSN: Address: Spouse SSN: SSN: Spouse	DOB:	pouse SSN:		
SSN:	SSN:	pouse SSN:		
Address: Children/Dependents: NAME SSN DOB NAME NAME SSN DOB NAME SSN DOB NAME NAME NAME SSN DOB NAME NAME NO Would you pedendent children attended a private school or were homeschooled (not public remote learning)? If a tax refund is issued, would you like direct deposit? (please provide a voided check.) Yes NO Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer electronic signing (DocuSign) for your returns? Yes NO SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-NISC) Income from Pensions, IRA's or Social Security (1099-R and SSA-1099) Income from Partnerships, S Corporations, Estates & Trusts (Schedule(s) K-1 from each business) Estates & Trusts (Schedule(s) K-1 from each business) Estates & Trusts (Schedule(s) K-1 from each business) Educational Expenses (1098-T) Marketplace Health Insurance (Form 1095-A) SECTION 3—OTHER INCOME Unemployment Compensation/State Income Tax Refund (Form 1099-G): \$	Address: Children/Dependents: NAME NAME SSI SECTION 2—STATEMENTS attended a private school or were if a tax refund is issued, would you like direct deposit? (please pr Would you prefer a paper copy or an electronic copy of your returns? SECTION 2—STATEMENTS AND FORMS (Attach those in the state of the sta	DOB DOB DOB DOB DOB DOB N DOB N DOB N DOB N DOB N DOB N A A A A A A A A A A A A		
Children/Dependents: NAME SSN DOB NAME NAME SSN DOB NAME SSN DOB NAME NAME SSN DOB NAME NAME SSN DOB NAME NO Would you preper a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer a paper copy or an electronic copy of your returns? Yes No Would you prefer electronic signing (DocuSign) for your returns? Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Mages (W-2, 1099-NEC, 1099-MISC) Income from Pensions, IRA's or Social Security (1099-R and SSA-1099) Income from Partnerships, S Corporations, Estates & Trusts (Schedule(s) K-1 from each business) SECTION 3—OTHER INCOME Unemployment Compensation/State Income Tax Refund (Form 1099-G): \$ Miscellaneous Income (Jury Duty, Prizes): \$ Gambling Winnings: \$ Gambling Losses: \$ Gambling Losses: \$	Children/Dependents: NAME NAME SSN NAME How many dependent children attended a private school or were If a tax refund is issued, would you like direct deposit? (please pr Would you prefer a paper copy or an electronic copy of your returns? Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those with the second processes of th	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No		
NAME SSN DOB NAME NAME SSN DOB NAME SSN DOB NAME NAME SSN DOB NAME NAME SSN DOB NAME NO Would you prefer a telectronic copy of your return? (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (please provide a voided check.) Yes No Would you prefer electronic signing (please provide a voided check.) Yes No Would you prefer electronic signing (please provide a voided check.) Yes No Would you prefer electronic signing (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (please provide a voided check.) Yes No Would you prefer electronic signing (please provide a voided check.) Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) SECTION 3—NEX, 1099-NEC, 1099-NISC) Income from Pensions, IRA's or Social Security (please provide a voided check.) Yes No SECTION 4—Prices Security (please provide a voided check.) Yes No SECTION 5. SECTION 5. SECTION 5. SECTION 5. SECTION 6. Marketplace Health Insurance (Form 1095-A) Marketplace Health Insurance (Form 1095-A) SECTION 6. SECTION 6. Marketplace Health Insurance (Form 1095-A) SECTION 7. Marketplace Health Insurance (Form 1095-A) SECTION 8. SECTION 9. Gambling Winnings: \$ Gambling Losses: \$ Gambling Losses: \$	NAME NAME SSI NAME NAME SSI NAME NAME SSI SSI SSI SSI NAME SSI SSI SSI SSI SSI SSI SSI S	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No		
NAME SSN DOB	NAME NAME NAME SSI How many dependent children attended a private school or were If a tax refund is issued, would you like direct deposit? (please pr Would you prefer a paper copy or an electronic copy of your returns? Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a second property of your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a second property closings for payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No		
NAME	NAME NAME How many dependent children attended a private school or were If a tax refund is issued, would you like direct deposit? (please proposed would you prefer a paper copy or an electronic copy of your returns? Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a second would be a	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No se that apply)		
How many dependent children attended a private school or were homeschooled (not public remote learning)? If a tax refund is issued, would you like direct deposit? (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer electronic signing (DocuSign) for your returns? Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-MISC)	How many dependent children attended a private school or were If a tax refund is issued, would you like direct deposit? (please provould you prefer a paper copy or an electronic copy of your returns? SECTION 2—STATEMENTS AND FORMS (Attach those Wages (W-2, 1099-NEC, 1099-MISC) Interests & Dividends (Bank or brokerage statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No se that apply)		
How many dependent children attended a private school or were homeschooled (not public remote learning)? If a tax refund is issued, would you like direct deposit? (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer electronic signing (DocuSign) for your returns? Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-MISC)	How many dependent children attended a private school or were If a tax refund is issued, would you like direct deposit? (please provided you prefer a paper copy or an electronic copy of your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a provided your prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a provided your prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a provided your prefer electronic signing (DocuSign) for your returns? SECTION 3—STATEMENTS AND FORMS (Attach those was a provided your prefer electronic signing (DocuSign) for your returns? SECTION 3—OTHER INCOME	homeschooled (not public remote learning)? ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No se that apply)		
If a tax refund is issued, would you like direct deposit? (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer electronic signing (DocuSign) for your returns? Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-MISC)	If a tax refund is issued, would you like direct deposit? (please provould you prefer a paper copy or an electronic copy of your returns? Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a property of the provous property closings for real estate.) Gain or loss from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No se that apply)		
If a tax refund is issued, would you like direct deposit? (please provide a voided check.) Yes No Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee) Would you prefer electronic signing (DocuSign) for your returns? Yes No SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-MISC)	If a tax refund is issued, would you like direct deposit? (please provould you prefer a paper copy or an electronic copy of your returns? Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a property of the provous property closings for real estate.) Gain or loss from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	ovide a voided check.) Yes No rn? (Additional copies available for a fee) Yes No se that apply)		
Would you prefer a paper copy or an electronic copy of your return? (Additional copies available for a fee)	Would you prefer a paper copy or an electronic copy of your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	rn? (Additional copies available for a fee) Yes No se that apply)		
SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-MISC) Interests & Dividends (Bank or brokerage statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME Unemployment Compensation/State Income Tax Refund (Form 1099-G): \$	Would you prefer electronic signing (DocuSign) for your returns? SECTION 2—STATEMENTS AND FORMS (Attach those was a section of the section o	Yes No se that apply)		
SECTION 2—STATEMENTS AND FORMS (Attach those that apply) Wages (W-2, 1099-NEC, 1099-NISC)	SECTION 2—STATEMENTS AND FORMS (Attach those wages (W-2, 1099-NEC, 1099-MISC) Interests & Dividends (Bank or brokerage statements from payers.) Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) 1099-K SECTION 3—OTHER INCOME	se that apply)		
<pre></pre>	 Wages (W-2, 1099-NEC, 1099-MISC) □ Interests & Dividends (Bank or brokerage statements from payers.) □ Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) □ 1099-K SECTION 3—OTHER INCOME			
☐ Interests & Dividends (Bank or brokerage statements from payers.) ☐ Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) ☐ 1099-K SECTION 3—OTHER INCOME Unemployment Compensation/State Income Tax Refund (Form 1099-G): \$	☐ Interests & Dividends (Bank or brokerage statements from payers.) ☐ Gain or loss from sales of stock or other assets (Statements from brokers, property closings for real estate.) ☐ 1099-K SECTION 3—OTHER INCOME	January Company Danier D. D. W. and Caralla Caralla		
Unemployment Compensation/State Income Tax Refund (Form 1099-G): \$ Miscellaneous Income (Jury Duty, Prizes): \$ Gambling Winnings: \$ Gambling Losses: \$		(1099-R and SSA-1099) Income from Partnerships, S Corporations, Estates & Trusts (Schedule(s) K-1 from each business) Educational Expenses (1098-T)		
Miscellaneous Income (Jury Duty, Prizes): \$ Gambling Winnings: \$ Gambling Losses: \$	<u> </u>			
Miscellaneous Income (Jury Duty, Prizes): \$ Gambling Winnings: \$ Gambling Losses: \$	Ilnemployment Compensation / State Income Tax Refund (Form 1099-C): \$			
Gambling Winnings: \$ Gambling Losses: \$		nu (rorm 1099-aj. \$		
	Cambling Winnings: \$	ambling Lossas: \$		
SECTION 4— ESTIMATED TAXES PAID (NOT the payment paid with your last return)	dambinig winnings. ψ da	anibinig Losses. $\psi_{\phantom{aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa$		
SECTION 4— ESTIMATED TAXES PAID (NOT the payment paid with your last return)				
DATE PAID AMOUNT DATE PAID AMOUNT	DATE PAID AMOUNT	DATE DAID AMOUNT		
DATE PAID AMOUNT DATE PAID AMOUNT	DATE PAID AMOUNT	AMOUNI		
DATE PAID AMOUNT DATE PAID AMOUNT	DATE PAID AMOUNT	리		
	DATE PAID AMOUNT	DATE PAID AMOUNT		



P | 260.484.1673 F | 260.484.1724 www.protaxwma.com

2023 TAX ORGANIZER

SECTION 5—DEDUCTIBLE EXPENSES		
MEDICAL EXPENSES	<u>INTEREST</u>	
Deductible—Portion that exceeds 7.5% of your adjusted gross	Home Mortgage Interest	
income. OUT OF POCKET ONLY	(Attach Form 1098 from bank):\$	
Insurance (Health or Long-Term Care): \$	Student Loan Interest	
Doctors Fees: \$ Hospital Fees: \$	(Attach Form 1098-E): \$	
nuspital rees: Þ		
Lab Fees: \$	CHARITABLE CONTRIBUTIONS	
Eyeglasses: \$ Prescription Drugs: \$	Church or Other Non-Profit Organizations**	
Mileage ·*Mileage log now required	**(No Cash, Must have copy of check or receipt)	
Mileage :*Mileage log now requiredOther Medical	\$	
TAXES (Estimated Taxes—See Below)	State Educational Institution (Include Name):	
Real Estate Taxes—Personal Residence: \$	No. Code (2010) No. 10	
Real Estate Taxes—Other: \$	Non-Cash (Goodwill—Itemize list if over \$250 details amount.)	ii and
Excise Tax From Auto Registrations	\$	
(Include Copy of Registration Form): \$	Mileage for Volunteering (14 cents/mile)	
Sales Tax Paid on Large Item Purchases	*Mileage log now required.	
(Car, Boat, Etc.) : \$	\$	
Same as Current Address? Yes No If no, what is CITY Landlord Name:	STATE ZIP C	ODE
I andland Address.		
Landiord Address: STREET CITY	STATE ZIP C	ODE
SECTION 6- MISC. DEDUCTIONS & EXPENSES IRA/SEP/SIMPLE Contributions: \$ HSA Contributions: \$ Did you contribute to a 529 Plan during the year? [Spouse: \$	
Child Care Expenses: \$		
Name of Caregiver:		
Address of Caregiver:	CITY STATE	ZIP CODE
Tax ID of Caregiver:		
Name of Dependents:		
Moving Expenses (MILITARY ONLY 17 cents/mile):\$ Casualty & Theft Losses (Presidentially Declared Disaster Adoption Expenses: \$	r Area/ Ponzi Schemes only): \$	



P | 260.484.1673 F | 260.484.1724 www.protaxwma.com

2023 TAX ORGANIZER—BUSINESS

To share QuickBooks files, please contact our office for a Client Portal log in.

SECTION 7—SCHEDULE C—BUSINESS INCOME AND EXPENSES		
Business Name:	Interest—Mortgage: \$	
Income: \$		
Inventory—End of Year: \$	Legal & Professional: \$	
Expenses: \$	Office Expense: \$	
Materials/Inventory:\$	Rent—Equipment Rental: \$	
Advertising: \$		
Bank Charges: \$		
Auto—Business Mileage*:		
* Mileage Log Required	Taxes: \$	
Total Mileage for Year (Business & Personal):	Travel: \$	
Year Vehicle Purchased:		
	Wages to Employees: \$	
Meals: \$,	
Equipment & Date Purchased: \$Type of Business:		
SECTION 8—SCHEDULE E—RENTAL INCOME AN		
Property Address:		
Income, ¢		
Income: \$	Management Fees: \$Office Expense: \$	
Expenses: \$Advertising: \$	5.	
Advertising: \$Auto—Business Mileage*:		
* Mileage Log Required	Taxes: \$	
0 0 1	Telephone: \$	
Year Vehicle Purchased:		
Cleaning—Maintenance: \$	Furnishings (list)\$:	
Commissions: \$		
Insurance: \$	Other (attach list): \$	
Interest—Mortgage: \$		
SECTION 9—SCHEDULE F—FARM INCOME AND I	EXPENSES	
Type of Business:		
Income: \$	Interest—Mortgage: \$	
	Interest—Other: \$	
Government Payments: \$	• •	
Expenses: \$	Repairs—Maintenance: \$	
Auto—Business Mileage*:	Seeds & Plants: \$	
Mileage Log Required	Storage: \$	
Total Mileage for Year (Business & Personal):	* *	
Year Vehicle Purchased:		
Chemicals: \$		
Custom Hire—Subcontract: \$	Equipment & Date Purchased (list):\$	
Feed: \$		
Fertilizer:\$	Gasoline: \$	