

# 2023 INCOME TAX ORGANIZER

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## TAXPAYER INFORMATION

TAXPAYER	SPOUSE
Name:	Name:
Social Security #:	Social Security #:
Date of Birth:	Date of Birth:
Mailing Address:	Mailing Address
Health Insurance Y or N	Health Insurance Y or N
Health Insurance Exchange Y or N	Health Insurance Exchange Y or N
Form 1095 A, B or C Y or N	Form 1095 A, B or C Y or N
Phone	Phone
Home:	Home:
Work:	Work:
Cell:	Cell:
E-mail:	E-mail:

## DEPENDENT INFORMATION

Name	SSN	Birthday	Relationship	W2 or 1099	Health Insurance
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N
				Y / N	Y / N

## ESTIMATED INCOME TAX PAYMENT INFORMATION

FEDERAL			STATE	
DUE DATE	DATE PAID	AMOUNT	DATE PAID	AMOUNT
4/15/2023				
7/15/2023				
9/15/2023				
1/15/2024				

## ELECTIONS

Apply refund to next year's estimated tax payments?	Yes No
Do you wish to electronically file your tax return?	Yes No
Would you like any refunds directly deposited?	Yes No

## WAGES and RETIREMENT PLAN DISTRIBUTIONS

**\*Include W2 and 1099R Form(s)**

Name of Payer	Gross Amount	Federal Withholding	State Withholding

<b>INTEREST INCOME</b>	
<b>*Include 1099-INT Form(s)</b>	
Bank/Institution	Amount

<b>DIVIDEND INCOME</b>	
<b>*Include 1099-DIV Form(s)</b>	
Source	Amount

<b>OTHER INCOME</b>			
Please provide supporting forms and documents from any of the following sources of income:			
Type	Provide	Type	Provide
Stock Sales	1099-B	Rental Income	1099-MISC & Accounting
Debt Forgiveness	1099-C	Royalty Income	1099-MISC
Retirement Income	1099-R	Prizes & Awards	1099-MISC
Commissions	1099-MISC	Gambling Winnings	W-2G
Unemployment	1099-G	Land/Home Sales	Settlement Statement
State Tax Refunds	1099-G	Self Employment	Income & Expense
Social Security Income	1099-SSA	Alimony	Summary of Revd.
Partnership/S-Corp	K1	Farm Government	1099-G
Trust/Estate	K1	Health Insurance	Form 1095 A,B, or C

<b>2023 DEDUCTIONS/CREDITS AND LIMITATIONS</b>
<p><b>Health Savings Accounts (HSA) Deduction</b>            For 2023 the following limitations apply: Family \$7,750, Self Only \$3,850. Age 55 an additional \$1,000 catch-up contribution per qualifying spouse. Contributions are due by 4/15/2024.</p>
<p><b>Individual Retirement Account (IRA) Deduction</b>            For 2023 the following limitations apply: Under the age of 50 - \$6,500, Age 50 and over-\$7,500. Contributions are due by 4/15/2024.</p>
<p><b>Child Tax Credit</b>            Provides a \$2,000 credit for each child under the age of 17 at the end of 2023.            Provides a \$500 credit for each child claimed that is over the age of seventeen.</p>
<p><b>Child Care Credits</b>            To claim this credit you will need the care providers name, address, and social security number/employer identification number. The credit is limited to 35 percent of qualifying expenses, \$3,000 for one child, \$6,000 for two or more children.</p>

## ITEMIZED DEDUCTIONS

### MEDICAL

Insurance

Health, Accident, Dental \_\_\_\_\_

Long-Term Care \_\_\_\_\_

Medicare \_\_\_\_\_

Out-of-Pocket

Prescription medicines & drugs \_\_\_\_\_

Doctors, dentists, and nurses \_\_\_\_\_

Hospitals and nursing homes \_\_\_\_\_

Medical Lodging & Transportation

Out-of-pocket expenses \_\_\_\_\_

Medical miles driven \_\_\_\_\_

### CHARITABLE CONTRIBUTIONS

Cash Contributions

Churches \_\_\_\_\_

Schools \_\_\_\_\_

Other Organizations \_\_\_\_\_

Volunteer Expenses

Out-of-pocket expenses \_\_\_\_\_

Charitable miles driven \_\_\_\_\_

Non-Cash Contributions

Under \$500 \_\_\_\_\_

Over \$500 \_\_\_\_\_

### INTEREST

Real Estate

Mortgage (Banks) \_\_\_\_\_

Mortgage (Others) \_\_\_\_\_

Name \_\_\_\_\_

EIN \_\_\_\_\_

Points, Origination \_\_\_\_\_

Mortgage Insurance \_\_\_\_\_

Other

Investment Interest \_\_\_\_\_

### TAXES

Real Estate

Residence \_\_\_\_\_

Investment Property \_\_\_\_\_

Property Tax (Utah)

Heavy Trucks \_\_\_\_\_

Commercial Trailers \_\_\_\_\_

Motor Home \_\_\_\_\_

**HEALTH INSURANCE INSTRUCTIONS (Obama Care Enrollees only)** Congress repealed the penalty for not having health insurance; if you are still receiving a monthly subsidy through either the Federal or your State’s exchange, you will still need to bring your form 1095-A. **will be unable to file your return without a Form 1095-A for all individuals that you claim on your return, who have coverage through a Health Insurance Exchange policy. If you lose your Form 1095-A Healthcare.gov says that it may take as long as eight weeks to issue you a new one. If you know your log in and password, we can print a copy of the 1095-A at your appointment.**

**College Tuition and Fees Instructions**

You will need to provide me with proof of payment as well as the total amount of tuition, fees, books, and supplies that you paid to all institutions of higher learning to take the education credits. The 1099-T that is issued by the University is no longer sufficient to claim the credit. There are now penalties for both the taxpayer and the preparer.

Congress has increased the standard deduction for all filers.

Filing Status	Standard Deduction
Married Filing Joint	\$27,700
Head of Household	\$20,800
Single	\$13,850

\*Increased by \$1,500 for those who are sixty-five or blind MFJ or MFS \$1,850 S or HOH

If you feel you will not exceed the standard deduction amount, you will not need to bring these items to your tax appointment: Medical Expenses, Property Taxes, Mortgage Interest and Charitable Contributions.

**Schedule C and F Filers**

Please bring your mortgage interest statement, property tax, and utilities so I can take an appropriate percentage of these expenses against your business income.