2024 TAX ORGANIZER

PLEASE COMPLETE AND DELIVER THIS WITH YOUR 2022 TAX DOCUMENTS

*** PLEASE INDICATE BELOW ALL NAMES AS THEY CURRENTLY APPEAR ON U.S. ISSUED SOCIAL SECURITY CARD*		
Taxpayer:	SSN:	DOB:
Spouse:	SSN:	DOB:
Taxpayer Occupation:	Spouse Occupation:	
Address:	Phone: Text? Y N	
	Phone: Text? Y N	
County:	E-mail:	
Dependent Information (use page 3 if more than 5 dependents):		
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:

PART I: Child Tax and Earned Income (EIC) Credits:

These Tax Credits are based on dependent relationship and residency. You will be required to attest that you are eligible to claim dependents as indicated, and must provide us with proof of residency/custody from the options below:

* School or medical records
* Child care provider statement
* Health care provider statement
* Form 8332 Release of Exemption

Include one or more of these documents, or acceptable equivalent, with your 2022 tax documents

PART II: Education Credits:

* 1098-T Tuition Statement(s)
* Summary or records of non-institutional expenses

1098-T forms are now mandatory to be able to claim education credits

PART III: Please indicate "Y" or "N" & provide documentation and/or use page 3 for further explanation:

- [ ] Are you/spouse/dependents citizens of the United States? If no, please explain for each person on page 3.
- [ ] Can you be claimed as a dependent on another's tax return?
- [ ] Did you have a change of marital status? If divorced and have minor children please provide the divorce decree.
- [ ] Do you have dependents that need to file a tax return?
- [ ] Did you receive an early retirement distribution in 2020 due to Covid? If so we need to know if you chose to pay tax over three years, opted out, or paid all or some back.
- [ ] Did you pay for child care while working, looking for work, or while a full time student?
- [ ] Have you received notice or are you currently under Federal, State or Local examination or audit?
- [ ] Did you provide over half of the support for any person(s) other than your dependent children in 2024?
- [ ] Did you and/or your spouse file bankruptcy in 2024?
- [ ] Did you have debt-forgiveness in 2024?
- [ ] Did you sell your personal residence or other real estate?
- [ ] Have you received a PTIN from IRS in lieu of your SSN due to identity fraud? If so please include this.
- [ ] Do you pay expenses related to the adoption of a child?
- [ ] Did you surrender any life insurance policies in 2024?
- [ ] Did you receive an inheritance or legal settlement in 2024?Did
- [ ] you gift cash or property, or receive a gift in 2024?
- [ ] Home Mortgage Debt - if over $750,000 we will need details
- [ ] Did you have costs that may qualify for a Home Energy Credit?

PART IV: Please indicate the QUANTITY of the following source document forms delivered to our office:

	Form (s) W-2		Form (s) W-2G Gambling Winnings
	Form (s) 1099 for Interest, Dividends & Stock Transactions		Form (s) 1099 Miscellaneous income
	Form (s) 1099 for Equivalent for Crypto-Currency Transactions		Form (s) 1099G Unemployment or State Refund
	Form (s) SSA-1099 for Social Security or Disability Benefits		Form (s) 1099S Sale of Real Estate
	Form (s) 1099-R for Pension or Retirement Distributions		Form (s) 1099K (Merchant Card & Third Party Payments)
	Form (s) 1098 for Mortgage Interest		Form (s) 1098E for Student Loan Interest
	Form (s) K-1 from Partnership, S-Corporation, or Trust		Form (s) 1099A Acquisition or Abandonment of property
	Form (s) 1098-T Tuition Statement		Form (s) 1095 A for Health Insurance Marketplace Statement
	Form (s) 1099C Cancellation of Debt Income		Other: ________________________________

PART V: Indicate Amount and/or provide documentation if Applicable

Individual IRA account contributions for 2022 self $ ____________ spouse $ ____________

Roth IRA Contributions for 2022 self $ ____________ spouse $ ____________

$ ____________ Child care expense information - will need statement from provider and amount for each child

$ ____________ Personal property tax amounts paid in 2022 (taxes paid on automobiles, boats, etc.)

$ ____________ Real estate tax amounts paid in 2024

$ ____________ Interest expense on primary residence

$ ____________ Interest expense on second home or investment home

$ ____________ Alimony Received or Paid in 2024 (provide copy of divorce decree unless we already have it)

$ ____________ Gambling winnings (include all W-2G's)

$ ____________ Gambling losses (remember to keep receipts)

$ ____________ Out-of-pocket medical expenses ____________ Self-paid health insurance premiums

$ ____________ Tuition paid in 2024 (even if paid by a loan) - Must provide 1098T forms(s)

$ ____________ Course-related books, supplies and equipment & for which student(s) must have for classes

$ ____________ Charitable contributions - cash (remember to keep receipts)

$ ____________ **Non- cash** Charitable contributions - <u>if over $500 total</u> for all charities in 2022 we will need more details.

Page 3 provides the details needed and resources for valuation.

$ ____________ If you are a teacher, how much did you spend on classroom supplies (incl. Covid-related supplies)

PART VI: Investment Accounts

__ yes ___ no Did you or your spouse receive, sell, send, exchange or otherwise acquire financial interest in virtual currency?

If yes, please provide transaction details for tax reporting purposes.

__ yes ___ no Did you or your spouse receive distribution(s) from a grantor/transferor to a foreign trust?

PART VII: Foreign Assets and Accounts

Foreign Account Tax Compliance (FATCA), enacted in 2011, requires certain US Taxpayers holding foreign financial assets in an aggregate value exceeding $50,000USD to report information about those assets on Form 8938. This form must be attached to the taxpayer's annual tax return. Failure to report foreign financial assets will result in a penalty of $10,000 per year.

FinCen Form 114a is required if a person or entity has a financial interest in or signatory authority over one or more accounts in a foreign country and that the aggregate value exceeds $10,000USD ay any time during the calendar year. This applies to US citizens, US residents and domestic entities. Willful failure to file FinCEN can be as high as $100,000 or 50% of the total value of the accounts per violation.

__ yes ___ no Did you or your spouse have foreign accounts or assets during 2022 as described above? If so be sure to discuss potential filign requirements with your CPA.

PART VI: Other Information:

TAX RETURNS FOR 20224WILL BE E-FILED. PLEASE CHOOSE AN OPTION FOR YOUR TAX REFUND OR PAYMENT:

☐ OPTION ONE: HERE IS MY BANK INFORMATION - PLEASE ALLOW REFUNDS TO BE DIRECTLY DEPOSITED INTO MY ACCOUNT. IF I OWE TAX, IT WILL NOT BE TAKEN FROM MY ACCOUNT. I UNDERSTAND I WILL NEED TO MAIL PAYMENTS WITH THE VOUCHERS PROVIDED.

NAME OF BANK: ______________________ *ROUTING NUMBER:* ______________

BANK ACCT TYPE (PLEASE CIRCLE): SAVINGS CHECKING *BANK ACCT NUMBER:* ______________

☐ OPTION TWO: I WOULD LIKE TO RECEIVE MY REFUND BY MAIL AND WILL ALSO MAIL PAYMENTS DUE WITH THE VOUCHERS PROVIDED.

PLEASE NOTE: IF YOUR TAX RETURN CANNOT BE TRANSMITTED ELECTRONICALLY, YOU WILL BE RESPONSIBLE FOR SENDING AND PAYING VIA U.S. MAIL.

DELIVERY OF TAX RETURNS: ☐ Electronic delivery via Confidential Client Portal ☐ Paper Copy to be Picked Up

OTHER TAX PAYMENTS:

F=	S=		Overpayments applied from previous years
F=	S=	Date=	Estimated tax payments - 1st quarter
F=	S=	Date=	Estimated tax payments - 2nd quarter
F=	S=	Date=	Estimated tax payments - 3rd quarter
F=	S=	Date=	Estimated tax payments - 4th quarter
F=	S=	Date=	Estimated tax payment with extension by 4/15/23

KCMO= ____________ Date= ____________ If you believe you might owe local tax but cannot file by 4/15, we recommend you request an extension form from us or go online to kcmo.org. This needs to be received by KCMO no later than 4/15/23 to avoid penalty for late payment.

NON-CASH CHARITABLE CONTRIBUTIONS OVER $500 IN AGGREGATE:

This information must be provided for each donation if the total of all donations is over $500 for the year. We cannot assign value for you but if you need assistance there are value guides available such as the Salvation Army at https://satruck.org/Home/DonationValueGuide

Date: ____________ Organization and Location: ______________________

Value $ ____________ Description of Items: ______________________

Please indicate any questions, anything unique to your tax situation that is not listed above, or needs further explanation:

Taxpayer Signature: ______________________ Date: ____________