

Realm Business and Tax Advisory  
1097 Aviation Blvd.  
Hermosa Beach, CA 90254

The 2023 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2023 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included on the organizer sections for your reference.

Please provide us with the following additional information:

- A copy of your 2022 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help in the completion of the Tax Organizer. Please contact us if you need further assistance.

Sincerely,

Realm Business and Tax Advisory

**2023****1040****US****Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?                             |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another retirement plan?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return?  |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency?  |

**2023 1040 US Tax Organizer**

**Realm Business and Tax Advisory**  
 1097 Aviation Blvd.  
 Hermosa Beach, CA 90254  
 Telephone number: 3103760455  
 Fax number:  
 E-mail address:

**Tax Return Appointment**  
 Date:  
 Time:  
 Location:

**This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.**

**CLIENT INFORMATION**

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

Address

Street address.....  
 Apartment number.....  
 City.....  
 State.....  
 ZIP code.....

**DEPENDENTS**

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

**WAGES, SALARIES AND TIPS**

Employer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2023 Amount

2022 Amount

Attach Forms W-2

_____
_____

**2023 1040 US Tax Organizer**

Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

**INTEREST INCOME**

Payer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2023 Amount	2022 Amount
<b>Attach Forms 1099-INT</b>	_____
	_____
	_____
	_____

**DIVIDEND INCOME**

Payer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

<b>Attach Forms 1099-DIV</b>	_____
	_____
	_____
	_____

**PENSION AND IRA INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

<b>Attach Forms 1099-R</b>	_____
	_____

**GAMBLING WINNINGS**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

<b>Attach Forms W-2G</b>	_____
	_____

Total gambling losses.....  
 Winnings not reported on Form W-2G.....

_____	_____
_____	_____

**OTHER GOVERNMENT FORMS - INCOME**

- Form 1099-B - Sales of stock (also include transaction history).....
- Form 1099-MISC - Miscellaneous income.....
- Form 1099-K - Merchant card and third party network payments.....
- Form 1099-S - Sales of real estate (also include closing statements).....
- Form 1099-G - State tax refunds.....

<b>Attach Forms 1099</b>
--------------------------

<b>Attach Forms 1099</b>	_____
--------------------------	-------

Taxpayer:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

<b>Attach Forms 1099</b>	_____
	_____

Spouse:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

<b>Attach Forms 1099</b>	_____
	_____

**MISCELLANEOUS INCOME**

Alimony received.....  
 Spouse: Alimony received.....

_____	_____
_____	_____

Other:

_____
_____

_____	_____
_____	_____



2023 1040 US Tax Organizer

Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

MEDICAL AND DENTAL EXPENSES (Continued)

Table with 2 columns: 2023 Amount, 2022 Amount. Rows include: Number of medical miles, Other:

TAXES PAID

Table with 2 columns: 2023 Amount, 2022 Amount. Rows include: State income taxes - 1/23 payment on 2022 state estimate, State income taxes - paid with 2022 state extension, State income taxes - paid with 2022 state return, State income taxes - paid for prior years and/or to other states, City/local income taxes - 1/23 payment on 2022 city/local estimate, City/local income taxes - paid with 2022 city/local extension, City/local income taxes - paid with 2022 city/local return, State and local sales taxes paid (except autos and special items), Use taxes paid on 2023 purchases, Use taxes paid on 2022 state return, Sales tax on autos not included above, Sales taxes paid on boats, aircraft and other special items, Real estate taxes - principal residence, Real estate taxes - property held for investment, Foreign income taxes, Other:

Personal property taxes (including automobile fees in some states)..... Attach Tax Notice

INTEREST PAID

Home mortgage interest and points paid Attach Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)

Points not reported on Form 1098

Investment interest (interest on margin accounts):

Passive Interest.....

2023

1040

US

Tax Organizer

Please enter all pertinent 2023 information. If you have attached a government form for an item, check the box and do not enter a 2023 amount.

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

	2023 Amount	2022 Amount
_____		
_____		
Volunteer Expenses (out-of-pocket).....		
Number of charitable miles.....		

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

_____		
_____		

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....		
Tax return preparation fee.....		
Safe deposit box rental.....		
Investment expenses.....		
Estate tax, section 691(c).....		

Unreimbursed employee expenses:

_____		
_____		

Other:

_____		
_____		