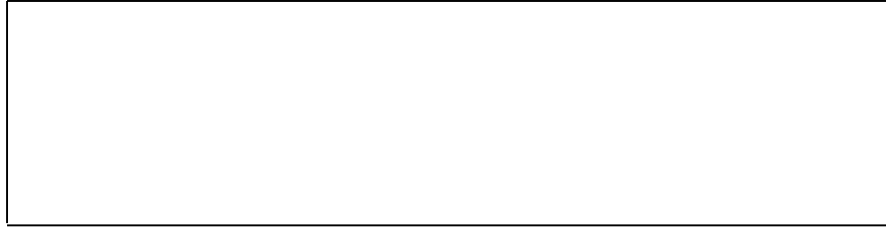


## 2023 Tax Organizer



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2023 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2023 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2022 information is included for your reference. You do not need to make any 2022 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2022 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, Form 1099-NEC or Form 1099-K.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- Copies of invoices regarding residential clean energy improvements.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

VT Consulting Inc

Telephone: (720) 902-5850

E-mail: vtconsultingcpa@gmail.com

## General Questions

PERSONAL INFORMATION		
	Yes	No
1 Did your marital status change during 2023? ..... If <b>yes</b> , explain .....	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you want to allow your tax preparer to discuss this year's return with the IRS? ..... If <b>no</b> , enter another person (if desired) to be allowed to discuss this return with the IRS. <b>Caution:</b> Review any transferred information for accuracy. Designee's Name ..... ▶ Phone Number ..... ▶ Personal Identification Number (5 digit PIN)..... ▶	<input type="checkbox"/>	<input type="checkbox"/>
3 Do you or your spouse plan to retire in 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
4 Were you or your spouse permanently and totally disabled in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Enter date of death for taxpayer or spouse (if during 2023 or 2024 ): Taxpayer: _____ Spouse: _____		
6 Were you or your spouse a member of the U.S. Armed Forces during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
DEPENDENT INFORMATION		
	Yes	No
7a Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want us to prepare the return(s)? .....	<input type="checkbox"/>	<input type="checkbox"/>
8a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want to include your child's income on your return? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Are any of your dependents <b>not</b> U.S. citizens or residents? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you provide over half the support for any other person during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you incur adoption expenses during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
IRA, PENSION AND EDUCATION SAVINGS PLANS		
	Yes	No
12 Did you receive payments from a pension or profit-sharing plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....	<input type="checkbox"/>	<input type="checkbox"/>
14a Did you convert all or part of a regular IRA into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did you roll over all or part of a qualified plan into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you contribute to a Coverdell Education Savings Account? .....	<input type="checkbox"/>	<input type="checkbox"/>
ITEMS RELATED TO INCOME/LOSSES		
	Yes	No
16 Did you receive any disability payments in 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you receive tip income <b>not</b> reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you buy, sell, refinance, or abandon a principal residence or other real property in 2023? (Attach copies of any escrow statements or Forms 1099.) .....	<input type="checkbox"/>	<input type="checkbox"/>
19a If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Are you planning to purchase a home soon? .....	<input type="checkbox"/>	<input type="checkbox"/>
c Did you incur any casualty or theft losses during 2023? .....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you incur any non-business bad debts? .....	<input type="checkbox"/>	<input type="checkbox"/>
PRIOR YEAR TAX RETURNS		
	Yes	No
21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? ..... If <b>yes</b> , enclose agent's report or notice of change.	<input type="checkbox"/>	<input type="checkbox"/>
22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? .....	<input type="checkbox"/>	<input type="checkbox"/>

## General Questions (continued)

### FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

	Yes	No
<b>23</b> Did you have foreign income or pay any foreign taxes in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>24a</b> At any time during 2023, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2023 ? Report all interest income on Org 11 .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>25</b> Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>26</b> Did you at any time during 2023, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year? .....	<input type="checkbox"/>	<input type="checkbox"/>

### HEALTH AND LIFE INSURANCE

	Yes	No
<b>27</b> Did you receive Form 1095-A (Health Coverage)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>28a</b> Did you or your spouse have self-employed health insurance? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>29</b> Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>30</b> Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....	<input type="checkbox"/>	<input type="checkbox"/>

### MISCELLANEOUS

	Yes	No
<b>31</b> Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023 ? If <b>yes</b> , please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>32</b> Did you purchase a motor vehicle or boat during 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , attach documentation showing sales tax paid.		
<b>33</b> Did you purchase an energy efficient vehicle in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , enter year, make, model, and date purchased: _____ also provide VIN: _____		
<b>34</b> Did you donate a vehicle in 2023 ? If yes, attach Form 1098C .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>35</b> What was the sales tax rate in your locality in 2023 ? _____ % State ID .....		
<b>36</b> Did you or your spouse make gifts of over \$17,000 to an individual or contribute to a prepaid tuition plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>37</b> Did you make gifts to a trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>38</b> If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach details.		
<b>39</b> Did you or your spouse participate in a medical savings account in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
<b>40</b> Did you make a loan at an interest rate below market rate? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>41</b> Did you pay any individual for domestic services in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>42</b> Did you pay interest on a student loan for yourself, your spouse, or your dependents? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>43</b> Did you, your spouse, or your dependents attend post-secondary school in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>44</b> Did a lender cancel any of your debt in 2023 ? (Attach any Forms 1099-A or 1099-C) .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>45</b> Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach information.		
<b>46</b> At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ..	<input type="checkbox"/>	<input type="checkbox"/>
<b>47</b> Did you obtain a Paycheck Protection Program (PPP) loan? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, has any portion of that loan been forgiven? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>48a</b> Do you want to change the language with which the IRS communicates with you? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If yes, which language? .....		

### ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

	Yes	No
<b>49</b> If your tax return is eligible for Electronic Filing, would you like to file electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>50</b> The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>Caution:</b> Review transferred information for accuracy.		
<b>51</b> If <b>yes</b> , please provide the following information:		
<b>a</b> Name of your financial institution .....		
<b>b</b> Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....		
<b>c</b> Account number .....		
<b>d</b> What type of account is this? .....	Checking	Savings <input type="checkbox"/>

Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

# Basic Taxpayer Information

## PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name .....	_____	_____
First name .....	_____	_____
Middle initial and suffix .....	MI ..... Suffix .....	MI ..... Suffix .....
Social security number .....	_____	_____
Occupation .....	_____	_____
Work phone/extension .....	_____	_____
Cell phone .....	_____	_____
E-mail address .....	_____	_____
Driver's License/Id issuing state .....	_____	_____
License /Id number .....	_____	_____
License/Id issue date .....	_____	_____
License/Id expiration date .....	_____	_____
Birthdate .....	_____	_____
Blind .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contribute to Presidential Election Campaign Fund .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Street address .....	_____	Apartment number .....
City .....	State .....	ZIP code .....
Home phone .....	Foreign country .....	_____
Fax .....	Foreign phone .....	_____

## FILING STATUS

**1** Single  
 **2** Married filing jointly  
 **3** Married filing separately  
     Check this box if you **did not** live with spouse at any time during the year .....   
     Check this box if you are eligible to claim spouse's exemption .....   
     Check this box if your spouse itemizes deductions .....   
 **4** Head of household  
     If the qualifying person is a child but not your dependent, enter  
     Child's name ..... Child's social security number .....  
 **5** Qualifying surviving spouse  
     Check the box for the year the spouse died ..... 2021  2022

## DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)	Social Security Number	**Code	+Months in U.S.	Not qua- lified credit Other dep	Date of Birth *Not Citizen	2023 Child Care Expense
						2022 Child Care Expense

**\*\* For the Dependent Code, enter the following:**  
 L = dependent child who lived with you  
 N = dependent child who didn't live with you due to divorce or separation  
 O = other dependent  
 Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)  
 + Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.  
 \* Check this box if dependent child is not a U.S. citizen or resident alien

## Rent and Royalty Income and Expenses

### BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: (not applicable) \_\_\_\_\_

Is this activity a qualified trade or business under Section 199A? ..... Yes  No

- 1** Check property owner ..... **Taxpayer**   **Spouse**   **Joint** **Yes**  **No**
- 2 a** Did you make any payments that would require you to file Form(s) 1099? .....
- b** If **yes**, did you or will you file all required Forms(s) 1099? .....
- 3 a** Enter the ownership percentage (if not 100%) ..... \_\_\_\_\_
- b** If not 100%, are you reporting 100% of the income and expenses? .....
- 4** Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) .....
- 5** Did you have personal use of this property or rent it for part of the year at less than fair rental value? .....
- 6** For all rental properties, **enter the number of days** during 2023 that:
- a** The property was rented at fair rental value ..... \_\_\_\_\_
- b** The property was used personally or rented at less than fair rental value ..... \_\_\_\_\_
- c** You owned the property, if not the entire year ..... \_\_\_\_\_
- 7 a** Does this rental have multiple living units and you live in one of the units? .....
- b** If **yes**, enter percentage of rental use ..... \_\_\_\_\_
- 8** Did you actively participate in this property's management during 2023 ? .....
- 9** Did you materially participate in this property's management during 2023 ? .....
- 10** Do you want to treat this property as non-passive? .....
- 11** Did this property have unallowed passive losses in 2022 ? .....
- 12** Did you dispose of this property in a fully taxable transaction? .....
- 13** Check this box if some of this investment was **not** at-risk .....
- 14 a** Treat all MACRS assets for this activity as qualified Indian reservation property? .....
- b** Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... **Regular**  **Extension**  **No**
- c** Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....
- d** Was this activity located in a Qualified Disaster Area? .....

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022		
<b>15</b> Rents or royalties received .....				
<p style="margin-left: 40px;"><b>* Property Types:</b></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b>1</b> Single family residence</p> <p><b>2</b> Multi-family residence</p> <p><b>3</b> Vacation/short-term rental</p> <p><b>4</b> Commercial</p> </td> <td style="width: 50%; vertical-align: top;"> <p><b>5</b> Land</p> <p><b>6</b> Royalties</p> <p><b>7</b> Self-rental</p> <p><b>8</b> Other</p> </td> </tr> </table>			<p><b>1</b> Single family residence</p> <p><b>2</b> Multi-family residence</p> <p><b>3</b> Vacation/short-term rental</p> <p><b>4</b> Commercial</p>	<p><b>5</b> Land</p> <p><b>6</b> Royalties</p> <p><b>7</b> Self-rental</p> <p><b>8</b> Other</p>
<p><b>1</b> Single family residence</p> <p><b>2</b> Multi-family residence</p> <p><b>3</b> Vacation/short-term rental</p> <p><b>4</b> Commercial</p>	<p><b>5</b> Land</p> <p><b>6</b> Royalties</p> <p><b>7</b> Self-rental</p> <p><b>8</b> Other</p>			

### Rent and Royalty Income and Expenses (continued)

EXPENSES	2023	2022
Property location .....		
<b>16</b> Advertising .....		
<b>17 a</b> Automobile (complete ORG18 for autos).....		
<b>b</b> Travel.....		
<b>18</b> Cleaning and maintenance .....		
<b>19</b> Commissions.....		
<b>20 a</b> Mortgage insurance premiums – qualified .....		
<b>b</b> Other insurance .....		
<b>21</b> Legal and professional fees .....		
<b>22</b> Management fees .....		
<b>23 a</b> Mortgage interest paid to banks –qualified .....		
<b>b</b> Mortgage interest paid to banks – other.....		
<b>24</b> Other interest .....		
<b>25</b> Repairs.....		
<b>26</b> Supplies.....		
<b>27 a</b> Real estate taxes.....		
<b>b</b> Other taxes .....		
<b>28</b> Utilities .....		
<b>29</b> Other expenses:		
<b>a</b> .....		
<b>b</b> .....		
<b>c</b> .....		
<b>d</b> .....		
<b>e</b> .....		
<b>30 a</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>b</b> Depletion <b>(Preparer Use Only)</b> .....		

## Business Income and Expenses

### GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A?  Yes  No

**1** Check ownership  **Taxpayer**  **Spouse**  **Joint**

**2** Business name .....

**3 a** Business street address.....

**b 1** City, State and Zip Code, or.....

**2** Foreign country..... (not applicable)

**4** Principal business/profession.....

**5** Employer ID number.....

**6** Business code (**Preparer Use Only**) .....

**Yes** **No**

**7** Was this business fully disposed of in a fully taxable transaction during 2023?

**8** Accounting method:

Cash  Accrual  Other (specify)  .....

**9** Method used to value closing inventory:

Cost  Lower of cost or market  Other (explain)  .....

**Yes** **No**

**10** Was there a change in determining quantities, costs, or valuations between opening/closing inventory? (If yes, attach explanation)

**11** Did you materially participate in the operation of this business during 2023?

**12** Did you start or acquire this business during 2023?

**13 a** Did you make any payments in 2023 that require you to file Forms 1099?

**b** If yes, did you or will you file all the required Forms 1099?

**14** At-risk determination:

**a** Is all of the investment in this activity at risk?

**b** Is some of the investment in this activity not at risk?

**15** Did you have unallowed passive losses in 2022?

**16 a** Treat all MACRS assets for this activity as qualified Indian reservation property?

**b** Treat all assets acquired after August 27, 2005 as qualified GO Zone property? **Regular**  **Extension**  **No**

**c** Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?

**d** Was this business located in a Qualified Disaster Area?

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022
<b>17</b> Gross receipts or sales.....		,
<b>18</b> Returns and allowances plus other adjustments.....		
<b>19</b> Other income (include federal/state gas tax credit/refund) .....		

COST OF GOODS SOLD – IF APPLICABLE	2023	2022
<b>20</b> Inventory at beginning of year .....		
<b>21</b> Purchases .....		
<b>22</b> Items withdrawn for personal use .....		
<b>23</b> Cost of labor (do not include your salary) .....		
<b>24</b> Materials and supplies .....		
<b>25</b> Other costs .....		
<b>26</b> Inventory at end of year.....		

## Business Income and Expenses (continued)

EXPENSES	2023	2022
Business name _____		
<b>27</b> Advertising .....		
<b>28</b> Car and truck expenses (complete ORG18).....		
<b>29</b> Commissions and fees.....		
<b>30</b> Contract labor .....		
<b>31</b> Depletion .....		
<b>32</b> Depreciation and Section 179 deduction ( <b>Preparer Use Only</b> ).....		
<b>33</b> Employee benefit programs:		
<b>a</b> Employee health insurance premiums .....		
<b>b</b> Other employee benefit programs .....		
<b>34</b> Insurance (other than health).....		
<b>35</b> Self-employed health insurance attributable to this business.....		
<b>36</b> Interest:		
<b>a</b> Mortgage paid to banks not reported to you on Form 1098.....		
<b>b</b> Other .....		
<b>37</b> Legal and professional services .....		
<b>38</b> Office expenses .....		
<b>39</b> Pension and profit-sharing plans.....		
<b>40</b> Rent or lease:		
<b>a</b> Machinery and equipment (enter vehicle lease on ORG18) .....		
<b>b</b> Other business property.....		
<b>41</b> Repairs and maintenance .....		
<b>42</b> Supplies (not included in cost of goods sold) .....		
<b>43</b> Taxes and licenses not reported to you on Form 1098.....		
<b>44</b> Travel and meals		
<b>a</b> Travel.....		
<b>b</b> Meals subject to 50% limit.....		
<b>c</b> Meals subject to 80% limit.....		
<b>d</b> Meals not subject to limit .....		
<b>45</b> Utilities .....		
<b>46</b> Gross wages .....		
<b>47</b> Other expenses:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
<b>48</b> Expenses for business use of your home ( <b>Preparer Use Only</b> ).....		
Complete ORG20 for Business Use of Home.		
<b>49</b> Qualified pension plan start-up costs .....		
<b>50</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>before</b> Jan. 1, 2018.....		
<b>51</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>after</b> Dec. 31, 2017 .....		



## Tax Payments

### 2023 ESTIMATED TAX PAYMENTS

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
<b>1</b> Qtr 1 due by 04/15/23 .....								
<b>2</b> Qtr 2 due by 06/15/23 .....								
<b>3</b> Qtr 3 due by 09/15/23 .....								
<b>4</b> Qtr 4 due by 01/18/24 .....								
<b>5 a</b> Additional payments .....								
<b>b</b> Additional payments .....								
<b>c</b> Additional payments .....								
<b>d</b> Additional payments .....								

### OTHER TAX PAYMENTS

	Federal	State	Local
<b>6</b> 2022 overpayment applied to 2023 .....			
<b>7</b> Balance due paid with 2022 return .....			
<b>8 a</b> 2022 Quarter 4 payments paid in 2023 .....			
<b>b</b> 2022 extension payments paid in 2023 .....			
<b>9</b> Other taxes paid in 2023 for prior years (include explanation) .....			

### 2024 ESTIMATED TAX WORKSHEET

If you expect any significant change in your income or expenses in 2024, please enter the increase or decrease below.

#### Income

<b>10</b> Wages .....	Taxpayer .....	
	Spouse .....	
<b>11</b> Self-Employment Income .....	Taxpayer .....	
	Spouse .....	
<b>12</b> Capital Gains (sale of stock, real estate, etc) .....		
<b>13</b> Other Income:		
Description .....		

#### Deductions

<b>14</b> Allowable Itemized Deductions .....	
<b>15</b> Other deductions (such as alimony paid, early withdrawal penalties, etc):	
Description .....	
<b>16</b> Federal Withholding .....	
<b>17</b> Number of personal exemptions expected for 2024 .....	

### ADDITIONAL INFORMATION

<b>18</b> Check to use your 2023 tax amount for your 2024 estimate .....	<input type="checkbox"/>
<b>19</b> If you have an overpayment of 2023 taxes, check the box to indicate how you want your overpayment applied.	
<b>a</b> Apply entire overpayment to next year and refund excess .....	<input type="checkbox"/>
<b>b</b> Apply entire overpayment to first quarter and refund excess .....	<input type="checkbox"/>
<b>20</b> Amount to apply if not entire overpayment .....	
<b>21</b> Number of installments for estimated tax (1 - 4) .....	

## Child and Dependent Care Expenses

### CHILD AND DEPENDENT CARE EXPENSES

Enter below the persons or organizations who provided the child and dependent care.

<b>First Name (if person) Last Name (if person) OR Provider Business Name Additional Business Name</b>	<b>Provider Address</b>	<b>ID Number SSN on first line OR EIN on second line</b>	<b>Amount Paid</b>
<b>Provider Phone</b>			
1	..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... Tax-Exempt .. ▶ <input type="checkbox"/>	..... ..... Foreign ..... ▶ <input type="checkbox"/>
2	..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... Tax-Exempt .. ▶ <input type="checkbox"/>	..... ..... Foreign ..... ▶ <input type="checkbox"/>
3	..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... Tax-Exempt .. ▶ <input type="checkbox"/>	..... ..... Foreign ..... ▶ <input type="checkbox"/>
4	..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... Tax-Exempt .. ▶ <input type="checkbox"/>	..... ..... Foreign ..... ▶ <input type="checkbox"/>

<b>EXPENSES</b>	<b>2023</b>	<b>2022</b>
1 Total employment taxes paid on wages for child care expenses .....		
2 Total expenses paid in 2023 but not incurred in 2023 .....		
3 Total expenses incurred in 2023 but not paid in 2023 .....		
4 Medical expenses paid for qualifying persons unable to care for themselves .....		

<b>STUDENT/DISABLED PERSON INFORMATION FOR 2023</b>	<b>Taxpayer</b>	<b>Spouse</b>
5 If taxpayer or spouse was a full-time student or disabled in 2023, answer the following questions:		
a Number of months that taxpayer/spouse was a full-time student or disabled .....		
b Did taxpayer or spouse work and earn less than \$250/\$500 during the months entered on line 5a? If No, leave line 5b blank. If Yes, multiply the number of months working and earning less by either \$250/\$500 and enter that amount here .....		

## Education Information

### EDUCATION TUITION AND FEES

Attach all Form 1098-Ts and a list of your qualified expenses.

EDUCATOR EXPENSES	2023	2022
<b>1 a</b> Taxpayer educator expenses.....		
<b>b</b> Spouse educator expenses.....		

### STUDENT LOAN INTEREST PAID

#### Student Loan Interest Reported on a 1098-E in 2023

<b>2 a</b> Enter detail below or total interest in Part 2b		
Lender's Name	2023	2022
<b>Total Student Loan Interest</b>	<b>2023</b>	<b>2022</b>
<b>2 b</b> Enter the total interest paid on qualified student loans.....		

### FORM 1099-Q

**3** Enter 1099-Q detail below.

State Code	Name of Payer or Program	Gross Distribution Box 1	Earnings Box 2	* Type Box 5

\* For the Type Code, enter the following:  
 P = Private Qualified Tuition Program  
 S = State Qualified Tuition Program  
 E = Coverdell ESA

# State Information Worksheet

## GENERAL INFORMATION

	<b>Taxpayer</b>	<b>Spouse</b>
1 Enter your state of residence .....	_____	_____
2 Check the appropriate box if:	<b>Taxpayer</b>	<b>Spouse</b>
a Full year resident.....	<input type="checkbox"/>	<input type="checkbox"/>
b Part year resident .....	<input type="checkbox"/>	<input type="checkbox"/>
c Nonresident .....	<input type="checkbox"/>	<input type="checkbox"/>
	Date of entry: _____	Date of exit: _____
3 Resident locality: _____		
4 County: _____	School district: _____	School district number: _____
	<b>Taxpayer</b>	<b>Spouse</b>
5 Check if disabled .....	<input type="checkbox"/>	<input type="checkbox"/>

## STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## MISCELLANEOUS QUESTIONS

		<b>Yes</b>	<b>No</b>
8 Did you file a state return for 2022? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you want state forms and instructions sent to you next year? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you want any applicable penalty and interest calculated and added to the return? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 How do you want your state refund (if any) applied?			
a Refunded .....	<input type="checkbox"/>	b Apply to 2024 estimates .....	<input type="checkbox"/>
		c Apply to 2024 taxes .....	<input type="checkbox"/>
12 Additional state information: _____			
_____			
_____			