

∞ EASTSIDE TAX & ACCOUNTING, LCC ∞

PERSONAL DATA ORGANIZER

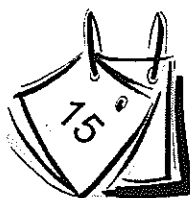
5680 MARSH RD ∞ SUITE B ∞ HASLETT, MI 48840
 PHONE: (517) 336 0151 FAX: (517) 336 6036
2TOM.ETA@GMAIL.COM
[HTTPS://WWW.EASTSIDETAXACCOUNTING.COM/](https://WWW.EASTSIDETAXACCOUNTING.COM/)

Name: _____

Date: _____

Time: _____

With : _____



This is your tax organizer for the 2023 Tax Year. Please complete the sections that pertain to you. Any questions or comments can be written in spaces provided. You may also choose to call the office and speak with a preparer.

If your filing status is **Head of Household** or you claim certain credits (such as: **Earned Income Tax Credit, Child Tax Credit, Other Dependent Credit, Education Credit**) the IRS requires tax preparers to have documentation of eligibility before we can file your return. You must provide documentation proving residency and expenses.

Examples include: School or medical records, and/ or tuition statement. *Please call the office before your appointment if you are unsure what documentation is necessary.*

If your return includes the Earned Income Tax Credit or Additional Child Tax Credit, the IRS projects direct deposits for those individuals often have a one-month wait.

CLEAN VEHICLE & HOME ENERGY CREDITS HAVE CHANGED SUBSTANTIALLY.

BRING DOCUMENTATION ON ANY OF THESE ITEMS. IF YOU HAVE QUESTIONS, CALL US.

PLEASE CHECK IF YOU WOULD BE INTERESTED IN THE OPTION TO PAY YOUR FEE ONLINE.

- PLEASE BRING THE FOLLOWING
TO YOUR TAX APPOINTMENT

ALL W-2, 1099'S, K-1'S, BROKER STATEMENTS, ETC.

 - ❖ BROKERAGE & MUTUAL FUND YEAR-END STATEMENT
 - ❖ YEAR-END BANK STATEMENTS
 - ❖ DRIVER LICENSE
 - ❖ SOCIAL SECURITY STATEMENT -- FORM SSA-1099
 - ❖ PROPERTY TAX STATEMENTS
 - ❖ MORTGAGE INTEREST STATEMENTS
 - ❖ MORTGAGE REFINANCE SETTLEMENT STATEMENTS
 - ❖ EDUCATION FORMS 1098-E OR 1098-T
 - ❖ PROPERTY SALES SETTLEMENT STATEMENTS
 - ❖ OTHER EVIDENCE OF INCOME & DEDUCTIONS
 - ❖ DATES OF BIRTH & SOCIAL SECURITY NUMBERS FOR ALL
 - ❖ A CURRENT VOIDED CHECK – FOR DIRECT DEPOSIT
 - ❖ COST INFORMATION FOR STOCK & BONDS SOLD
 - ❖ ACA HEALTH COVERAGE FORMS 1095-A
 - ❖ 1099 G UNEMPLOYMENT
 - ❖ 1099 C DEBT FORGIVENESS

NEW CLIENTS PLEASE BRING LAST YEAR'S TAX RETURN

NOTES & QUESTIONS

AS ALWAYS, WE STAND READY TO SERVE ALL YOUR TAX, ACCOUNTING, BOOKKEEPING, PAYROLL NEEDS.

IF YOU HAVE QUESTIONS ABOUT OUR SERVICES, CALL US AT (517) 336 – 0151

SELF-EMPLOYMENT OR ADDITIONAL INCOME

OTHER INCOME	AMOUNT	BRING DOCUMENTATION OF AMOUNTS	AMOUNT
Alimony Received		Child Support Received	
Scholarships & Grants		Unemployment Received – Form 1099G	
Prizes, Bonuses, Awards		Gambling & Lottery Wining – Form W2G	
Unreported Tips		If Gambling Winnings, Losses	
Director Or Executor Fees		Jury Duty	
Workers Compensation		Disability Income	
Veterans Pension		Payments from prior Installment Sales	
State Income Tax Refund		OTHER:	
City Income Refund			

SELF EMPLOYED BUSINESS INCOME & EXPENSES (1099'S) – MUST HAVE DOCUMENTATION FOR THE FOLLOWING

Gross Income		Gifts		Postage & Ship.		Wages	
Refunds		Equipment		Seminars/ Conf.		Rent Paid	
Bgn Inventory		Interest		Small Tools		Fees	
Purchases		Legal & Acctg.		Supplies		Business Insurance	
End Inventory		Labor		Taxes & License		Internet	
Advertising		Office Expense		Telephone		Meals	
Bank Charges		Maintenance		Travel		Other/Misc	
Dues & Pubs		Repair		Utilities			

RENTAL INCOME & EXPENSES
(IF NEW RENTAL PROPERTY, PROVIDE SETTLEMENT STATEMENT & TAX BILL)

Property	Address		
1			
2			
3			
Property # Above	1	2	3
Income			
Advertising			
Cleaning & Fees			
Commission & Fees			
Insurance			
Legal & Professional			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Utilities			
Labor			
Telephone			
Other			

OFFICE IN HOME
(USE MUST BE EXCLUSIVE, REGULAR & THE PRINCIPLE PLACE OF BUSINESS.)

Purchase Date	Cost		
Total ft²	Business Ft²	Rent	Utilities
Insurance	Maintenance	Repair	other

BUSINESS USE OF AUTO (YOU MUST KEEP CURRENT WRITTEN RECORDS, INCLUDING YEAR-END MILEAGES TO TAKE AUTO DEDUCTIONS. CALL IF YOU HAVE ANY QUESTIONS ABOUT AUTO USE.)

	Vehicle 1	Vehicle 2
Year/Make		
Total Miles		
Purch. Date		
Business Miles		
Commuter Miles		
Interest Paid		
Oper. & Maintn Cost		
Lease Cost		
Home to Work Miles		

FOR THOSE WHO MAY STILL ITEMIZE

MEDICAL/DENTAL EXPENSES PAID IN CURRENT YEAR		(THESE ARE ONLY DEDUCTIBLE WHEN THEY EXCEED 7.5% OF YOUR INCOME)	
Medical Insurance premium (paid by you)		Doctor, Dentist, Nursing Care, Etc.	
Long Term Care Insurance		Glasses, Contacts, Hearing Aids, Batteries, Etc.	
Prescription Drugs/ Medical Equip & Supplies		Hospital, Nursing Home, ETC.	
Auto Mileage (for medical reasons)		Other Medical/Dental	

TAXES PAID		(BRING ALL PROPERTY TAX STATEMENT PAID & ASSESSED IN 2023, EVEN IF NOT PAID, INDICATE ONES NOT ACTUALLY PAID)	
Real Estate (property) taxes		Taxable Value from tax statement	
Auto Tags		Other _____	

INTEREST EXPENSES		(CREDIT CARD & CAR LOAN INTEREST IS NOT DEDUCTIBLE UNLESS IT IS USED FOR HOME MORTGAGE OR BUSINESS)	
Mortgage Interest Paid		Land Contract Paid: \$	
Investment Margin Interest		Name _____	
Other Investment Interest		Address _____	
Other Deductible Interest		Social Security # _____	

CHARITABLE CONTRIBUTIONS		(AMOUNTS \$250 AND ABOVE MUST BE DOCUMENTED BY RECEIPTS)	
Cash Donations- Charity Name	Amount & Date	Non-Cash Donations- Charity & items description	FMV & Date

ENERGY EFFICIENT IMPROVEMENTS		(MUST BE DOCUMENTED BY RECEIPTS, BRING THEM WITH YOU)	
Insulation		Solar/Wind/Geothermal	
Windows		Furnace or Water Boiler (nat. gas, propane, oil)	
Exterior Doors		Electric Vehicle & Charging Stations	

Comments or questions:

We're Accountants for Main Street....

... Not Wall Street.