

**Affinity Financial Advisors, LLC**  
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## 2023 Tax Organizer

### Taxpayer Information

Name \_\_\_\_\_

Occupation \_\_\_\_\_

Cell phone \_\_\_\_\_

E-mail \_\_\_\_\_

Date of birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

Home phone \_\_\_\_\_

### Spouse Information

Name \_\_\_\_\_

Occupation \_\_\_\_\_

Cell phone \_\_\_\_\_

E-mail \_\_\_\_\_

Date of birth \_\_\_\_\_

Address \_\_\_\_\_ Apt. # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Did your marital status change during 2023? If yes, please circle one: Married Divorced Separated

Are you or your spouse totally and permanently disabled? If yes, please circle: You Spouse

Are you or your spouse an honorably or generally discharged veteran? If yes, please circle: You Spouse

Did you or your spouse pay/receive alimony in 2023? Please circle: You Spouse Paid Rec'd Amt: \_\_\_\_\_

In 2023, did you acquire, sell or exchange any financial interest in virtual currency? Circle one: No Yes

If you or your spouse contributed to a ROTH or Traditional IRA in 2023, please check here. \_\_\_\_\_

### INCOME DOCUMENTS AND INFORMATION TO INCLUDE WITH THIS ORGANIZER:

**Please note:** We will need a copy of **your current driver's license (and your spouse's, if married)** to file your returns. You can send us clear copies with the organizer. Or, we can make copies here in the office during your appointment.

**Dependent information.** Please provide a copy of the **Social Security card** for every dependent under the age of 25. We will also need every dependent's name as it appears on their Social Security card and their date of birth.

**Daycare.** If you had care expenses for dependents, please provide the 1) Name of the Provider, 2) Address, 3) Tax ID Number and 4) the Amount Paid. Alternately, please provide the year-end statement from the care provider(s).

**Education Expenses.** Please provide **Form 1098-T** for yourself, your spouse and/or dependents. If a student had a distribution from a 529 plan, please provide **Form 1099-Q**. Please list any amount you or your spouse paid into a New Jersey 529 plan: \_\_\_\_\_

**Student Loan Interest.** If any student loan interest was paid in 2023, please provide **Form(s) 1098-E**.

**Wages.** Please provide copies of all **W-2's** received in 2023 and any unreported tip income.

**Retirement income.** Please provide copies of all Forms **1099-R, 1099-CSA, 1099-CSF** and **Social Security or Railroad Retirement Benefit** forms received.

**Investment income.** Please provide copies of all **Forms 1099-INT, 1099-DIV, 1099-B** (sales in brokerage accounts) and **Forms 1099-S** (sales of real estate).

**Health Insurance statements.** Please provide any **Form(s) 1095-A** you received.

**1099 and Small Business income.** Please provide copies of **Form 1099-MISC**, **Form 1099-NEC** and **Form 1099-K**. If you had corresponding business expenses from running a small business, you will also need the Business Organizer and Vehicle Expense Organizer. Both forms are available on the AFA website.

**Rental Income.** If you had income from a rental property or vacation rental (ex., AIRBNB) property, include a summary of the income and expenses with this organizer.

**Other Forms to provide:** **Form(s) 1099-C** (canceled debt) **Form(s) 1099-A**, **Form(s) W2-G** (gambling or lottery winnings), **1099-G** (government payments, including **Unemployment Income** statements and state tax refunds, **Schedule(s) K-1** (income from partnerships, corporations, estates and trusts), and **jury duty** income statements.

**DEDUCTION INFORMATION TO INCLUDE WITH THIS ORGANIZER:**

**Medical Expenses Paid.** Please provide a summary of health expenses paid in 2023 for yourself, your spouse, your dependents and any children who would be your dependents except that another parent is claiming them in 2023. Include health insurance coverage premiums, hospital, medical, dental, vision, prescription, physical therapy, and other IRS-approved health expenses. You can also include documented mileage to healthcare providers in 2023.

**State and Local Taxes Paid.** Include real estate taxes paid on your principal residence and any additional homes or land. If you purchased any of the following, you may be able to deduct the sales tax paid: Motor Vehicle, Boat or Aircraft, Home (including mobile or prefabricated homes) or Major Home Renovation.

**Mortgage Interest Paid.** Please attach Form(s) 1098 showing mortgage interest paid. If you purchased or sold a home in 2023, include a copy of the closing disclosure/settlement (HUD) statement.

**Charitable Contributions.** Please provide a list of the cash/check/credit card charitable donations you made in 2023. If you made donations of noncash items (clothing, food, etc.), please provide receipts from the groups that received the donations, along with your list of the donated items. If you donated a vehicle, please provide Form 1098-C

**Miscellaneous deductions.** Most miscellaneous deductions, such as union dues or job mileage etc. are no longer deductible on a federal return. However, some states, including PA, still allow these deductions. If you have gambling winnings, the offsetting gambling losses are still deductible. If you have gambling winnings, you should provide your win/loss statements or other summaries of your gambling losses.

**SOME ADDITIONAL ITEMS:**

If you made any **energy-efficient improvements to your home in 2023**, check here. \_\_\_\_\_

**Hybrid and Electric Vehicle(s).** If you purchased or leased one of these vehicles in 2023, please check here. \_\_\_\_\_

**Disaster Losses.** Were you impacted by a federally-declared disaster in 2023? Please check here. \_\_\_\_\_

**Estimated Tax Payments.** If you made estimated tax payments in 2023, please check here and include a list. \_\_\_\_\_

Do you owe state use tax on Internet purchases, Mail-order purchases or on other Out-of-State Purchases? No Yes

**ELECTRONIC FILING AND DIRECT DEPOSIT BANK INFORMATION:**

In most cases, we are required to file your tax returns electronically. If you do not wish to file electronically, please check here: \_\_\_\_\_

If you receive a refund, do you want direct deposit? Please circle: Yes No

If you owe on your tax return(s) do you want direct debit of the amount owed? Please circle: Yes No

Bank info: Routing # \_\_\_\_\_ Acct # \_\_\_\_\_

Bank name: \_\_\_\_\_ Type of account: Please circle: Checking Savings

If AFA prepared your prior-year tax returns, and your bank info has not changed, please check here: \_\_\_\_\_