



2023 TAX ORGANIZER

IMPORTANT: This document contains your personal information. Do not e-mail or digitally send this document to ANYONE. When you are ready to send it to our office, please contact us at +1 (814) 224-5196, and a staff member will provide you with a link to a secure portal.

To help prevent identity theft, the IRS requires the following information.

Taxpayer's Name	Social Security #	Birthdate
Occupation	Driver's License #	Issue Date
Phone	DL State	Expiration Date

Spouse's Name	Social Security #	Birthdate
Occupation	Driver's License #	Issue Date
Phone	DL State	Expiration Date

Street Address	City	
State	ZIP	Municipality
School District	E-mail Address	

IMPORTANT: If you moved during 2023, please fill out the additional address fields on the next page.

Marital status at the end of 2023 - please check one.

Single
 Married
 Married Filing Separately
 Head of Household
 Widow(er)

If Widow(er), please give the date of spouse's death here

I'm a dependent of

Name of parent/guardian/other

Please list any dependents you may have.

Dependent Name	SSN	Birthdate	Relationship	Months in Home
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How would you like to receive your refund? Please check one.

Paper Check

Direct Deposit

IMPORTANT: If you choose direct deposit, please provide a voided check from your bank.

Routing #

Checking #

Please answer the following questions:

At any time during 2023, did you:

(a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Yes No

Did you receive a 1099K?

Yes No

Did you receive a 1095A for health insurance? Please bring it with you.

Yes No

Did you make estimated payments?

Yes No

If so, please fill out the amounts below (in USD).

Federal

State

Local

Additional Address(es)

Street Address

City, State, Zip

Date of Move

Additional Address(es)

Street Address

City, State, Zip

Date of Move

Additional Notes/Comments

By signing this document, you are stating that all information is true and correct.

Taxpayer's Signature

Date

Spouse's Signature

Date