



**ACCOUNTING SOLUTIONS**  
**(716) 681-2694**

1

*Client Organizer*

**2023**

**INCOME TAX RETURN INFORMATION - PRELIMINARY DATA -FOR TAX YEAR - 2022**

Name: \_\_\_\_\_ OCCUPATION \_\_\_\_\_

Spouse: \_\_\_\_\_ OCCUPATION \_\_\_\_\_

ADDRESS (IF MOVED): \_\_\_\_\_

TAXPAYER EMAIL ADDRESS: \_\_\_\_\_

SPOUSE EMAIL ADDRESS: \_\_\_\_\_

BANK ROUTING \_\_\_\_\_ BANK ACCOUNT NUMBER \_\_\_\_\_

**DEPENDENTS**

NAME	SS#	DOB	19-23 Y/O Students
			College in 2023 Yes/No

**QUARTERLY ESTIMATED TAX PAYMENTS IF YOU PREPAID**

FEDERAL	AMOUNT PAID	NEW YORK STATE	AMOUNT PAID
APRIL 2023	\$	APRIL 2023	\$
JUNE 2023	\$	JUNE 2023	\$
SEPTEMBER 2023	\$	SEPTEMBER 2023	\$
JANUARY 2024	\$	JANUARY 2024	\$

**IRA CONTRIBUTIONS**

TYPE	TAXPAYER 1	TAXPAYER 2
TRADITIONAL IRA	\$	\$
ROTH IRA	\$	\$

## **Most Common Income Forms**

### **OTHER INCOME FORMS**

<b>WAGES</b>	<b>(W-2)</b>
<b>INTEREST INCOME</b>	<b>(1099 INT)</b>
<b>DIVIDEND INCOME</b>	<b>(1099 DIV)</b>
<b>IRA</b>	<b>(1099R)</b>
<b>ANNUITY Withdrawal</b>	<b>(1099R)</b>
<b>PENSION Withdrawal</b>	<b>(1099R)</b>
<b>Social Security</b>	<b>(SSA-1099)</b>
<b>Gambling winnings</b>	<b>(W-2G)</b>
<b>Unemployment benefits</b>	<b>(1099G)</b>
<b>Health Savings Account</b>	<b>(1099SA)</b>
<b>Other Income</b>	<b>(1099 MISC)</b>
<b>Stock Sales</b>	<b>(1099 B)</b>
<b>Crypto Currency</b>	<b>(1099 B)</b>
<b>College Tuition</b>	<b>(1098-T)</b>

## **POSSIBLE DEDUCTIONS**

SALES TAX ON NEW VEHICLE PURCHASE      \$ \_\_\_\_\_

### **MEDICAL**

#### **UNREIMBURSED MEDICAL AND DENTAL EXPENSES:**

Prescriptions      \$ \_\_\_\_\_

Health Insurance Premiums      \$ \_\_\_\_\_  
(DO NOT include pretax payments through work)

Long Term Care Insurance  
Taxpayer      \$ \_\_\_\_\_  
Spouse      \$ \_\_\_\_\_

Doctors/Dentists      \$ \_\_\_\_\_

Hospitals      \$ \_\_\_\_\_

Contacts/Eyeglasses      \$ \_\_\_\_\_

Miles driven for medical purposes      \_\_\_\_\_

### **REAL ESTATE TAXES**

	<b>School</b>	<b>County</b>	<b>Village</b>
<b>Primary Residence</b>			
<b>2<sup>nd</sup> Property (Non-Rental)</b>			

### **INTEREST**      Mortgage Interest/Home Equity Loan Interest

Paid to: \_\_\_\_\_ \$ \_\_\_\_\_

Paid To: \_\_\_\_\_ \$ \_\_\_\_\_

### **CHARITABLE CONTRIBUTIONS**

Cash and/or Check: \_\_\_\_\_ \$ \_\_\_\_\_

Non-cash Donations: \_\_\_\_\_ \$ \_\_\_\_\_

### **ENERGY EFFICIENCY**

Windows, Exterior Doors, Insulation, Furnace, Boiler, Metal Roof, Solar Panels      \$ \_\_\_\_\_  
(Please provide receipts for purchases)

**ALIMONY:**      Recipient: \_\_\_\_\_ SS#: \_\_\_\_\_ \$ \_\_\_\_\_

**CHILD CARE:** Provider: \_\_\_\_\_ EIN/SS#: \_\_\_\_\_ \$ \_\_\_\_\_