2023 **Tax Organizer**

Months at Home



Lawson & Company CPAs LLC

4th Quarter

1507 Airport Rd

1507 Airport Rd Rockwall, TX 75087 & 2435 N. Central Expy, Ste 880 Richardson, TX 75080

(972) 475-0644

LawsonCPAs.com

info@ LawsonCPAs.com

		TAXPAYER	INFORMATI	ON			
Full Legal Name						_	
Social Security # Date Of Birth				Occupation		_	
Spouse Legal Name							
Social Security # Date Of Birth				Occupation			
Street Address			Phone 1	()_			
City State Zip			Phone 2	()_			
Contact preference? E-Mail Address				Tax return delivery preference? Paper or Electronic			
	SALAF	RIES AND WAGE	CS (enclose a	all W-2 forms)			
W-2 Gross Inc 1 2	ome	Federal Withheld	FICA	Medicare S	State Withheld	SDI	
3							
	FILING STAT	US		ADJUSTM	MENTS TO INCO	ME	
				RETIREMENT PI	LAN CONTRIBUT	TONS	
☐ Single ☐ Married ☐ Head of Household ☐ Married Filing Se			g Separate	IRA \$ SEP Plan \$ Other Plan \$			
	REFUND						
Automatic deposit?		, _] No	· —	ve an LLC or Corp	oration?	
	DEPENDEN	ITS		Y	es No		
Dependent 1 Name				Entity Name?			
Birth Date				•			
SSN							
Relationship							
Months at Home					TED TAX PAYM	ENTS	
D 1 (2)					mont Data Data	Amerrat	
_						Amount	
				•			
•				ESTIMA FEDERAL Estimated Tax Pay 1st Quarter 2nd Quarter 3rd Quarter	ment Date Paid	Amount	

OTHER INCOME	OTHER INCOME (CONTINUED)			
INTEREST — Attach Forms 1099INT	INCOME FROM PARTNERSHIPS, ESTATES, LLCS, TRUSTS, AND S CORPORATIONS			
Payor Amount	Attach Forms K-1 and list any not received yet			
DIVIDENDS — Attach Forms 1099DIV Payor Amount	OTHER INCOME Including jury duty fees, finder's fees, director's fees, prizes, gambling winnings, disability payments, unreported tip income and any			
HEALTH INSURANCE — Attach Forms 1095(A) (B) or (C)	other income (whether taxable or non-taxable) Attach detailed schedule			
Number of months covered:				
Did you have health Insurance in the Exchange? Y or N				
CAPITAL GAINS — Attach Forms 1099B and 1099S	RENTAL INCOME & EXPENSES			
Date Date Sales Cost or	Property # 1 # 2			
Description Acquired Sold Price Basis	- INCOME			
	INCOME Rents Received			
	_ Reins Received			
	EXPENSES			
	Advertising			
PENSIONS/IRA/ANNUITY INCOME — Attach Forms 1099R	Association Dues			
Payor Amount	Auto & Travel Cleaning/Maintenance			
	Insurance			
	Labor			
	Professional Fees			
ALIMONY RECEIVED / PAID	Miscellaneous Montage Interest			
ALIMONI RECEIVED/PAID	Mortgage Interest Other Interest			
Payor/Payee	Repairs & Maintenance			
Payor/Payee SSN Amount	Supplies			
	Taxes			
	Telephone			
UNEMPLOYMENT BENEFITS RECEIVED — Attach 1099G				
Tarra array A marray	Improvements			
Taxpayer Amount	Other: (list)			
Spouse Amount				
	·			
SOCIAL SECURITY BENEFITS RECEIVED — Attach Stmt	1			
(SSA-1099)				
Taxpayer Amount				
Spouse Amount				

ITEMIZED DEDUCTIONS	INCOME FROM BUSINESS OR PROFESSION		
MEDICAL & DENTAL EXPENSES	GENERAL INFORMATION		
Attach detailed schedule			
Insurance Premiums	Cash Basis Accrual Basis		
Doctors, Dentists, etc.	☐ First Year ☐ Taxpayer ☐ Spouse		
	Principal Business/Profession		
	Business Name		
	Business Address		
TAXES PAID	City, State, Zip		
	INCOME		
State & Local Income Tax	Gross Receipts or Sales		
State Sales Tax	Returns and Allowances		
	Other Income		
Real Estate Taxes – Residence			
Real Estate Taxes – Other Property	COST OF GOODS SOLD – If Applicable		
Personal Property Taxes	Inventory at Beginning of the Year		
Other Taxes	Purchases		
	Cost of Labor		
	Materials & Supplies		
	Other Costs		
DYFEDERE BAND AND A FEBRUARY	Inventory at End of the Year		
INTEREST PAID – Attach Forms 1098	EVENTAGE		
TT M (1st)	EXPENSES		
Home Mortgage (1st)	Advertising		
Home Mortgage (2 nd) Home Mortgage (Equity Line)	Car & Truck Expenses*		
Student Loan Interest	Commissions Insurance (other than health)		
Student Loan Interest	Health Insurance Premiums for Self*		
	Interest		
	Legal & Professional		
	Office Expense		
	Pension & Profit Sharing Plans		
CONTRIBUTIONS – Attach Detailed Info	Rent – Vehicles, Machinery & Equipment		
	Rent – Business Property		
Contributions by Cash or Check	Repairs & Maintenance		
Contributions Other than Cash	Supplies		
	Taxes – Property		
	Taxes – Other		
	Telephone		
OTHER INFORMATION	Travel		
	Total Meals & Entertainment*		
	Utilities		
	WagesOther*		
	*Attach detailed schedules		
	Anuch detaned schedules		
	HOME OFFICE		
	Did you have a home office during the year?		
	☐ Yes ☐ No		
	Office Square Footage: Home Square Footage:		
	If yes, attach detailed schedule of expenses including mortgage interest		
	(or rent), real estate taxes, utilities, property insurance, maintenance & cleaning		

MISCELLANEOUS QUESTIONS

New No	If any of the following items pertain to you or your spouse for the year 2023, please check the appropriate box and include all pertinent details				
or tax return forms? Provide details. Do have Health Insurance for you and/or your family? If yes, how much did you pay in premiums? \$					
4.	2. 🗌 🖺				
5.	3. 🗌 🗎	Do have Health Insurance for you and/or your family? If yes, how much did you pay in premiums? \$			
6.	4. 🗌 🗎	Do you have Health Insurance through an exchange or your employer?			
Are any of your unmarried children, who may be claimed as dependents, 19 years of age or older at the end of 2023? 8.	5. 🗌 🗎	Do you have a Health Savings Account (HSA) or Medical Savings Account (MSA)?			
8.	6. 🗌 🗎	Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year?			
Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old in order to enable you to work or attend school on a full-time basis? (Please provide details) 10.	7. 🗌 🗎	Are any of your unmarried children, who may be claimed as dependents, 19 years of age or older at the end of 2023?			
order to enable you to work or attend school on a full-time basis? (Please provide details) 10.	8. 🗌 🖺	Did any of your children under age 19 or students under age 24 receive investment income of \$2,500 or more?			
11.	9. 🗌 🖺				
12. Did you purchase, sell or refinance your principal home or your second home, or obtain a home equity loan during the year? If yes, please provide escrow papers and other relevant information. 13. Did you make any energy-efficient improvements or purchases for your home? 14. Did you incur a loss because of damaged or stolen property? 15. Did you make any gifts over \$17,000 during the year? 16. Did you receive any distribution from an IRA or other qualified plan? (Form 1099R) 17. Did you open a Roth IRA account or convert an IRA into a Roth IRA? 19. Were you granted or did you exercise any stock options? 20. Please provide us with a copy or your 2022 Tax return (only if we didn't prepare your return last year)	10. 🗌 🔲	Did you have any debts cancelled or forgiven?			
equity loan during the year? If yes, please provide escrow papers and other relevant information. 13.	11. 🗌 🔲	Did you acquire or dispose of any business assets (including real estate) during the year?			
Did you incur a loss because of damaged or stolen property? Did you make any gifts over \$17,000 during the year? Did you receive any distribution from an IRA or other qualified plan? (Form 1099R) If yes, was this rolled over? (Form 1099R) Did you open a Roth IRA account or convert an IRA into a Roth IRA? Were you granted or did you exercise any stock options? Please provide us with a copy or your 2022 Tax return (only if we didn't prepare your return last year) Signature:	12. 🗌 🔲				
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LOVIDATOR	Signature:	Taxpayer Spouse			