

2023 Client Organizer

Wheeler's Tax Service
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PERSONAL INFORMATION

If filing status, dependents or contact information changed from prior year, check here

Taxpayer

Legal First Name & Initial _____
Preferred Name _____
Last Name _____
Social Security No. _____
Date of Birth _____
Occupation _____
Pronouns Used _____
Home Phone _____
Work Phone _____
Other Phone _____
E-mail Address _____
Street Address _____
City _____ St _____ Zip _____
Driver's License/ID No. _____ State _____
Iss Date _____ Exp Date _____

Spouse

Legal First Name & Initial _____
Preferred Name _____
Last Name _____
Social Security No. _____
Date of Birth _____
Occupation _____
Pronouns Used _____
Home Phone _____
Work Phone _____
Other Phone _____
E-mail Address _____
Street Address _____
City _____ St _____ Zip _____
Driver's License/ID No. _____ State _____
Iss Date _____ Exp Date _____

If you moved during 2023, enter your previous address.

QUESTIONS

- Yes No Are you or your spouse legally blind?
- Yes No Did you purchase health insurance through a public exchange? Include 1095-A
- Yes No Did you receive unemployment or disability income?
- Yes No Are you a member of the military? Please include your end of year LES and state of residency.
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- Yes No Did you purchase, sell, or refinance any of your homes or take an equity loan?
- Yes No Did you convert a traditional/SEP/SIMPLE IRA to a Roth IRA?
- Yes No Did you, or will you, contribute to an IRA for 2023 (outside of payroll contributions)?
_____Traditional _____Roth
- Yes No Can you be claimed as a dependent on another person's tax return?
- Yes No Did you make any clean energy home improvements or purchase an electric vehicle?
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- Yes No Did you use any mortgage loan proceeds for purposes other than to buy, build or improve your home?
- Yes No Did you receive income from a sharing/gig economy activity? (e.g. Airbnb, Uber, etc)
Did you foreclose, file bankruptcy, have repossession, debt forgiveness, or debt consolidation
procedures? Bring 1099-C
- Yes No Do you have any financial interest in a foreign bank account or foreign trust?
- Yes No Do you have any income from or did you live in a foreign country?
- Yes No Did you make any purchases from a catalog or internet and not pay sales tax?
- Yes No Have you purchased any Series I Bonds, Series EE Bonds, or Treasuries in the last few years?
If so, check your TreasuryDirect account for any 1099-INT forms
- Yes No Did you have any education expenses for you or dependents?
- Yes No Do you expect any significant changes in income or deductions in 2023?
- Yes No Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?
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- Yes No 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)? (*Digital assets include cryptocurrencies, NFTs, and stablecoins*)

Estimated Tax Payments (if applicable)

	Federal	State
Prior Year - Jan 17, 2023	_____	Prior Year - Jan 17, 2023 _____
1st Qtr - Apr 18, 2023	_____	1st Qtr - Apr 18, 2023 _____
2nd Qtr - June 15, 2023	_____	2nd Qtr - June 15, 2023 _____
3rd Qtr - Sep 15, 2023	_____	3rd Qtr - Sep 15, 2023 _____
4th Qtr - Jan 16, 2024	_____	4th Qtr - Jan 16, 2024 _____
Total	=====	Total =====

Itemized Deductions

Medical/Dental Expenses

Medical Ins Prem (paid by you)	_____
Long Term Care Insurance	_____
Prescription Drugs	_____
Glasses, Contacts	_____
Hearing Aids, Batteries	_____
Medical Equipment, Supplies	_____
Hospital	_____
Doctor, Dentist, Specialist	_____
Medical Miles	Jan - June _____
	July - Dec _____

Other _____

Real Estate Taxes Paid

Real Estate Taxes - Primary Residence	_____
*Bring Tax Bills	_____
Other Real Estate Taxes	_____
Personal Property Tax	_____
ex. Mobile home, Vehicles (depends on state)	_____
Sales Tax	_____
Other	_____

Mortgage Interest Expense	_____
Mort Int Paid - Bring 1098	_____
Equity Line of Credit	_____
Use of Equity Loan	_____
Interest pd to others - 1098	_____
Paid to	Name _____
	Address _____

	SSN-EIN _____
Investment Interest	_____

Charitable Contributions (Receipts Req)

Church Cash Contributions	_____
Other Cash Contributions	_____
Donated Goods	_____
Organization Donated To and Address	_____

Volunteer Miles	_____

Miscellaneous Expenses (not work related)

Gambling Losses	_____
Losses require documentee substantiation	_____
Other	_____
Other	_____
Other	_____
Other	_____

