

Charles J. Carpentieri, EA, MBA

C.J. Carpentieri Associates 7 Old Sherman Turnpike Suite 105 Danbury, CT 06810-4174

Phone: (203) 778-6626 Fax: (203) 778-0361 e-mail: ccarpentieri@snet.net Website: www.cjcarpentieri.com

2023 PERSONAL INCOME TAX ORGANIZER AND QUESTIONNAIRE

TAXPAYER NAME:

(Last, First, Middle Initial) _____

(home phone number)

(bus. phone number)

(cell phone number)

(e-mail address)

BIRTH DATE: ____ - ____ - ____

SOCIAL SECURITY NUMBER: ____ - ____ - ____

OCCUPATION: _____

CHECK IF LEGALLY BLIND ____

CHECK IF PERMANENTLY DISABLED ____

SPOUSE NAME:

(Last, First, Middle Initial) _____

BIRTH DATE: ____ - ____ - ____

SOCIAL SECURITY NUMBER: ____ - ____ - ____

OCCUPATION: _____

CHECK IF LEGALLY BLIND ____

CHECK IF PERMANENTLY DISABLED ____

Check if this is a new address

CURRENT
MAILING
ADDRESS:

City

State

Zip Code

DEPENDENTS:

(list names as shown on social security cards)

Name

Birth Date

Soc. Sec. No

Relationship

1)

2)

3)

4)

5)

(Attach Additional sheet with this information if needed)

IDENTITY PROTECTION PIN NUMBERS: If the IRS issued you Identity Protection PIN(s) please provide them here:

Also bring in the IRS letter(s) assigning the PINs

Taxpayer _____

Spouse _____

Your return cannot be filed without these numbers.

ITEMS I WILL NEED AT OUR INTERVIEW:

- ❖ This completed 2023 Personal Income Tax Organizer and Questionnaire. We will keep this “Organizer” in our files along with an electronic copy of your completed tax return.
- ❖ If you are a new client, please provide copies of last year’s tax return.
- ❖ All W-2’s, 1099’s, and any other IRS forms reporting income, contributions, sales and distributions for the year (include copies of all the pages).
- ❖ 1098 forms and copies of real and personal property tax bills / receipts and mortgage interest documentation.
- ❖ 1098-T Tuition Statement received from eligible educational institutions. See question 70.
- ❖ Form 1095-A (for health insurance purchased through a public (State or Federal) exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- ❖ Detailed listing of your other itemized expenses and deductions paid during the year.
- ❖ **Support for quarterly estimated Federal & State income tax payments made for the 2023 tax year.**
- ❖ Copies of returns (K-1’s) for partnerships, joint ventures, S Corporations, estates or trusts.
- ❖ If you sold any property or stock during the year, see Questions 101 and 102.
- ❖ If you bought / refinanced your home or other property this year, bring in a copy of your closing statement, and an accounting of use of borrowed funds if in excess of present mortgage (refinance only). If you previously refinanced your home be prepared to explain how you used any additional mortgage amounts.
- ❖ Self-employed individuals and rental property owners must provide supporting income and expense schedules.
- ❖ Bank account number and bank routing number (checking or savings) for electronic filing purposes.
(Bring in checkbook for Routing # / Account # verification-provide us with a voided check)
- ❖ For enhanced **IRS Identity Safeguards** please provide a copy of your **Driver License or State issued ID**. For joint returns both taxpayers ID’s are required.

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PLEASE CIRCLE ANY OTHER TOPICS YOU WOULD LIKE TO DISCUSS AT A FUTURE MEETING. WE WILL BE HAPPY TO ASSIST YOU WITH ALL OF YOUR FINANCIAL NEEDS:

| | | | |
|-------------------|------------------|-----------------|-------------------------------|
| RETIREMENT | EDUCATION | ESTATE | ACCOUNTING/BOOKKEEPING |
| PLANNING | FUNDING | PLANNING | PAYROLL |

OTHER FINANCIAL CONCERNS – EXPLAIN _____

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TAXPAYER’S ATTESTATION STATEMENT TO THE TAX PREPARER: To the best of my (our) knowledge and belief, all of the information furnished herewith is true and complete and is to be relied upon by you accordingly. You are allowed as tax preparer to discuss this year’s return with tax authorities upon their request.

Taxpayer’s Signature

Date

Spouse’s Signature

Date

TAXPAYERS MUST COMPLETE AND SIGN THIS DOCUMENT FOR TAX PREPARER FILE

Answer Questions Carefully. You may have an item of Tax Consequence that should be accounted for in your return.

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| 1. <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during 2023? |
| 2. <input type="checkbox"/> | <input type="checkbox"/> | Are you in a same sex marriage recognized in your State? |
| 3. <input type="checkbox"/> | <input type="checkbox"/> | Will the address on your 2023 Federal Return be different from the one shown on your 2022 return? If yes provide your New Address: _____ |
| 4. <input type="checkbox"/> | <input type="checkbox"/> | Did you confirm the accuracy of social security numbers for you and your dependents on your 2022 tax return? |
| 5. <input type="checkbox"/> | <input type="checkbox"/> | Did your occupation(s) change from the prior tax year? |
| 6. <input type="checkbox"/> | <input type="checkbox"/> | Were you notified by the IRS or a State taxing authority of changes to a prior year's return? (If yes, enclose the related correspondence). |
| 7. <input type="checkbox"/> | <input type="checkbox"/> | Did you provide financial support to a person other than your spouse and dependent children during the year such as a Foster Child? |
| 8. <input type="checkbox"/> | <input type="checkbox"/> | Are you being claimed as a dependent by another person? |
| 9. <input type="checkbox"/> | <input type="checkbox"/> | Was there any change in dependents from the prior year? Any child born in 2023 will require a SS#. If due to spouse's death, do you elect Estate 706 filing for "portability"? Yes _____ No _____ |
| 10. <input type="checkbox"/> | <input type="checkbox"/> | Are any of your dependents NOT U.S. citizens or residents? |
| 11. <input type="checkbox"/> | <input type="checkbox"/> | Did any of your dependent children have total gross income over \$1,250, which included some unearned investment income? i.e. interest, dividends, capital gains. Note: The Kiddie Tax is now tied to the parent marginal tax rate. |
| 12. <input type="checkbox"/> | <input type="checkbox"/> | Do you have a child who is under age 19 or a full-time student under age 24 with unearned investment income greater than \$2,500 in 2023? |
| 13. <input type="checkbox"/> | <input type="checkbox"/> | If any of your dependents must file an income tax return, do you want us to prepare the return? |
| 14. <input type="checkbox"/> | <input type="checkbox"/> | Do you own a 2 nd vacation home? i.e. <u>a third home</u> . |
| 15. <input type="checkbox"/> | <input type="checkbox"/> | Were you an Active member of the Armed Forces serving in a "combat zone" in 2023? |
| 16. <input type="checkbox"/> | <input type="checkbox"/> | Were you on Active Duty in the U.S. Armed Forces or outside the U.S. after the sale of your residence? If Yes, enter the dates of active duty (month, day, year) From: _____ To: _____ |
| 17. <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business, purchase rental property or farm or acquire an interest in a partnership or "S" Corporation in 2023? If yes, circle which one. |
| 18. <input type="checkbox"/> | <input type="checkbox"/> | Did you have exclusive business use of a portion of your home? If yes, be prepared to give us the total square footage of your home and the square footage of your business use portion. |
| 19. <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of a reserve component of the Armed forces of the U.S. who incurred reserve-related overnight travel expenses?. |
| 20. <input type="checkbox"/> | <input type="checkbox"/> | Were you or your spouse permanently and totally disabled in 2023? |
| 21. <input type="checkbox"/> | <input type="checkbox"/> | If either you or your spouse are self-employed, are either of you covered under an employer's health plan at another job? |
| 22. <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse have self-employed health insurance? |
| 23. <input type="checkbox"/> | <input type="checkbox"/> | Did you have a domestic employee working in your home such as a nanny, gardener, care giver, etc. whom you paid at least \$2,600 in 2023? If yes, bring in payroll records. |
| 24. <input type="checkbox"/> | <input type="checkbox"/> | Are you or your spouse a member of a qualified emergency response organization? (volunteer Firefighter or EMS) |
| 25. <input type="checkbox"/> | <input type="checkbox"/> | Did you become divorced or legally separated in 2023? If yes, bring in written decree. |
| 26. <input type="checkbox"/> | <input type="checkbox"/> | Did you adopt a child in 2023? If yes, bring in documentation supporting adoption expenses. |
| 27. <input type="checkbox"/> | <input type="checkbox"/> | Did you <u>open</u> a qualified health savings account (HSA) in 2023? If you already have an HSA and it is still open check here _____ |
| 28. <input type="checkbox"/> | <input type="checkbox"/> | If legally married as of 12-31-23, but estranged, did you live apart from spouse for any significant periods of time? |

(QUESTIONS CONTINUE ON PAGE 2)

Answer Questions Carefully. You may have an item of Tax Consequence that should be accounted for in your return.

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| 29. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability payments in 2023? |
| 30. <input type="checkbox"/> | <input type="checkbox"/> | Did you realize a gain on property, which was taken from you by destruction, theft, seizure or condemnation? |
| 31. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any tips or gratuities during the year? If yes, were all tips reported to your employer? YES___ NO___ |
| 32. <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or any of your dependents receive a scholarship or fellowship grant as a student during the year? |
| 33. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any type of prize, award, legal settlement, or gambling winnings during the year? If substantial gambling winnings, obtain record of 2023 gambling losses. |
| 34. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any state or local income tax refunds during the year? |
| 35. <input type="checkbox"/> | <input type="checkbox"/> | Did you have any state unemployment compensation this year? |
| 36. <input type="checkbox"/> | <input type="checkbox"/> | Did you have any indebtedness discharged or forgiven in 2023 such as in a bankruptcy proceeding, home foreclosure, principal home loan reduction or credit card settlement? If yes, provide details & related 1099s. |
| 37. <input type="checkbox"/> | <input type="checkbox"/> | Did you make any withdrawals in 2023 from a qualified tuition program (529 Plan) or Coverdell ESA for college education expenses? If yes, bring in receipts to substantiate expenditures and supporting IRS Form 1099-Q. |
| 38. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any rent or royalty income during the year? Rental: Yes___ No___ Royalty: Yes___ No___ |
| 39. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive stock from a stock bonus plan with your employer? |
| 40. <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse exercise or dispose of any company stock options during the year? If yes, bring in company / brokerage firm supporting documentation. |
| 41. <input type="checkbox"/> | <input type="checkbox"/> | Any stock options such as "puts" and "calls" sold or expired this year? If yes, supply company/brokerage firm supporting documentation. |
| 42. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any tax-exempt interest income? (e.g. from state or municipal bonds) |
| 43. <input type="checkbox"/> | <input type="checkbox"/> | Did you surrender (redeem) any U.S. savings bonds during 2023? |
| 44. <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay foreign taxes in 2023? |
| 45. <input type="checkbox"/> | <input type="checkbox"/> | Did you engage in any bartering transactions during the year? |
| 46. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any installment sale payments during 2023 on the elected installment sale of property or equipment? |
| 47. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any pension, social security or annuity payments in 2023? If you receive Social Security bring in SSA-1099. |
| 48. <input type="checkbox"/> | <input type="checkbox"/> | Did you own an interest in a Real Estate Mortgage Conduit (REMIC) during 2023? |
| 49. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any reimbursement from your employer to cover moving expenses in 2023? If this was a Military move see #62. |
| 49a <input type="checkbox"/> | <input type="checkbox"/> | At any time during 2023, did you receive, sell, exchange, or otherwise acquire any financial interest in any virtual currency? |

- | YES | NO | |
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| 50. <input type="checkbox"/> | <input type="checkbox"/> | Was there any time period during 2023 that you, your spouse or any of your dependents did not have health insurance that is considered minimum essential coverage? If yes, bring a schedule of the months each person was covered and the premiums paid. |
| 51. <input type="checkbox"/> | <input type="checkbox"/> | Did you obtain health insurance coverage on a State or Federal health exchange? If yes, provide Form 1095-A (Health Insurance Marketplace Statement) |
| 52. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive Form 1095-B or Form 1095-C? If yes, please provide. |
| 53. <input type="checkbox"/> | <input type="checkbox"/> | Were you eligible for an exemption granted by the State or Federal Exchange? If yes, bring your approval letter with your Exemption Certificate Number (ECN). |
| 54. <input type="checkbox"/> | <input type="checkbox"/> | Did you receive the advanced Premium Tax Credit through a State or Federal Exchange? If yes, Form 1095-A must be provided to complete your return. |

Note: Effective January 1, 2019, the Tax Cuts and Jobs Act (TCJA) reduced the penalty imposed on individuals who do not maintain health insurance that provides minimum essential coverage (MEC) to zero. Technically, individuals who do not qualify for an exception are still required to carry MEC; however, they are not subject to a penalty if they do not have MEC.

(QUESTIONS CONTINUE ON PAGE 3)

Answer Questions Carefully. You may have an item of Tax Consequence that should be accounted for in your return.

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| 55. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any loan interest in 2023 on qualified student loans for yourself, your spouse or your dependents? |
| 56. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any interest on a loan for a boat or RV that has living quarters? |
| 57. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make aggregated PROPERTY contributions or auto donations over \$500 or INDIVIDUAL check/cash contributions of any amount to a charitable organization? (If yes, provide documented support for values used). |
| 58. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any individual tangible property (non-cash) donations valued at \$5,000 or more. |
| 59. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any charitable donations of clothing and/or household items during 2023? If yes, we need written support for amount/values claimed. Bring in letters, acknowledgements, completed tickets from Goodwill, Savers, etc. |
| 60. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any qualified HSA (Health Savings Account) contributions in 2023? If yes, bring in Form 5498-SA. (HSA contributions made while on Medicare and/or Social Security are not qualified) |
| 61. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur an uninsured casualty or theft loss attributed to a federally declared disaster? |
| 62. | <input type="checkbox"/> | <input type="checkbox"/> | Did you move as a member of the Armed Forces on active duty due to a military order and permanent change of station? If yes, you may qualify to deduct moving expenses and mileage. |
| 63. | <input type="checkbox"/> | <input type="checkbox"/> | Did you use the proceeds from Series EE U.S. savings bond purchased after 1989 to pay for higher education expenses? |
| 64. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any business, charitable or medical travel mileage in 2023? If yes, circle which one(s). |
| 65. | <input type="checkbox"/> | <input type="checkbox"/> | If you are an eligible educator / teacher, (grades K1-K12) did you incur classroom material or professional development expenses during the year? If so, provide details. (Up to \$300 in classroom material expense is allowed in 2023 as an above the line deduction). Be prepared to give us the total amount of your classroom expenses. |
| 66. | <input type="checkbox"/> | <input type="checkbox"/> | Did you contribute any funds in 2023 to a Sec 529 qualified college savings program in your resident state such as CT's CHET program? |
| 67. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay alimony? If yes, paid to: _____ SS# _____ Amount Paid \$ _____ |
| 68. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay unreimbursed college costs in 2023? If yes, provide tuition and non-tuition amounts paid per qualifying individual. |
| 69. | <input type="checkbox"/> | <input type="checkbox"/> | For NYS workers/residents, did you pay qualified college tuition expenses in 2023 for yourself, spouse or a dependent? |
| 70. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any college education payments in 2023 that may be eligible for Education Tax credits? If yes, provide support (Form 1098T received from school, cancelled checks, college statements, etc.) No credit is allowed without a form 1098-T. |
| 71. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any employer provided "educational assistance" or "dependent care benefits?" If yes, circle which one. |
| 72. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay child or dependent care expenses to allow you to work or become a full time student? If yes, provide name, address and ID number of care provider. |
| 73. | <input type="checkbox"/> | <input type="checkbox"/> | Reserved for future use. |
| 74. | <input type="checkbox"/> | <input type="checkbox"/> | Reserved for future use. |
| 75. | <input type="checkbox"/> | <input type="checkbox"/> | Reserved for future use. |
| 76. | <input type="checkbox"/> | <input type="checkbox"/> | Did you repay in 2023 any previously taxed income such as Social Security Benefits? |
| 77. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for long-term care insurance in 2023? If yes, provide total premiums paid for each insured. |
| 78. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any significant purchases this year (car, boat, trailer, SUV, furniture, etc.) on which you paid State Sales Tax? If yes, provide the amount of sales tax paid \$ _____ and locality tax rate _____. |

Great Job so far! You are more than half way there! Perhaps it's time for a coffee, beer or a glass of wine break. !

(QUESTIONS CONTINUE ON PAGE 4)

Answer Questions Carefully. You may have an item of Tax Consequence that should be accounted for in your return.

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| 79. | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase special fuels for non-highway business use? If yes, please list the type of use and # of gallons for each fuel. |
| 80. | <input type="checkbox"/> | <input type="checkbox"/> | During 2023, did you add qualified solar panels, solar water heating equipment or a fuel cell to your U.S. principal residence? |
| 81. | <input type="checkbox"/> | <input type="checkbox"/> | In 2023, did you buy residential energy efficient items such as windows, doors, insulation, furnace, wood or pellet stoves, central a/c, etc? If yes, please provide receipts for these expenditures. |
| 82. | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new qualified fuel cell or plug in electric drive motor vehicle in 2023? If yes, bring in dealer documents. Also, please identify other setup costs you paid such as plugs, etc. |
| 83. | <input type="checkbox"/> | <input type="checkbox"/> | Reserved for future use. |
| 84. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have any worthless securities or uncollectible bad debts? (Bad debts with relatives are usually not deductible). |
| 85. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any unreimbursed business related educational expenses? |
| 86. | <input type="checkbox"/> | <input type="checkbox"/> | Tax law and IRS regulations allow deductions for business travel and expenses if adequate records can be presented. If you have such expenses, please provide records (if available) containing the following information: 1. amount; 2. time and place; 3. date & description; 4. business purpose; and 5. business relationship of recipient. Do you have records as described, for such expenses? |

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| 87. | <input type="checkbox"/> | <input type="checkbox"/> | Did you convert a regular IRA to a ROTH IRA in 2023? |
| 88. | <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer money from an IRA to an HSA during 2023? |
| 89. | <input type="checkbox"/> | <input type="checkbox"/> | If over 59 ½ and making withdrawals, do you have any NONDEDUCTIBLE IRAs? If yes, provide all of your 12/31/23 IRA values. |
| 90. | <input type="checkbox"/> | <input type="checkbox"/> | Are you the beneficiary of an IRA/Company retirement plan whose owner is recently deceased? |
| 91. | <input type="checkbox"/> | <input type="checkbox"/> | Are you interested in establishing a Coverdell Education Savings Account, College Savings 529 Plan and/or ROTH IRA for 2023? |
| 92. | <input type="checkbox"/> | <input type="checkbox"/> | Have you started required minimum IRA / qualified plan withdrawals? The required beginning date for RMD's is age 73 for individuals who attain age 72 after 2022. |
| 93. | <input type="checkbox"/> | <input type="checkbox"/> | If over age 70 ½, did you make a Trustee transfer from your IRA to a charitable organization in 2023? |
| 94. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any lump-sum payments from a pension or profit-sharing plan? If yes, did you rollover part or all of the payment into an IRA or other qualified plan within 60 days? yes ____, no ____ |
| 95. | <input type="checkbox"/> | <input type="checkbox"/> | Are you or your spouse an active participant in an employer provided retirement plan such as a pension, SIMPLE IRA, profit sharing, 401K or 403(b) TSA? |
| 96. | <input type="checkbox"/> | <input type="checkbox"/> | Are you interested in making a traditional IRA or a nondeductible IRA contribution for 2023? If you have already made, or are planning on making, nondeductible IRA contributions for 2023, I will need the custodian name, and 12-31-23 account balance for each of your IRA accounts. The minimum age of 70 ½ is repealed. |
| 97. | <input type="checkbox"/> | <input type="checkbox"/> | If under 59 ½ as of 12-31-23 have you or your spouse made any "early" withdrawals or loans from your IRA/qualified plans in 2023? |
| 98. | <input type="checkbox"/> | <input type="checkbox"/> | If self-employed, are you interested in making a SEP IRA contribution? |
| 99. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any pension benefits in 2023 as a retired Military Person, Teacher, Firefighter or Police Officer? If yes, circle which one. |
| 100. | <input type="checkbox"/> | <input type="checkbox"/> | Do you or your spouse plan to retire in 2024? |

Answer Questions Carefully. You may have an item of Tax Consequence that should be accounted for in your return.

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| 101. | <input type="checkbox"/> | <input type="checkbox"/> | Did you sell stock or other investment securities? If yes, 1099-B from your broker is needed plus items 1-6 in Question 102 below. |
| 102. | <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell a home or other real estate? If yes, provide: (1) description of property, (2) date of purchase, (3) date of sale, (4) purchase price, (5) selling price, (6) selling expenses, (7) improvements and (8) closing statements for sale and repurchase if any. |
| 103. | <input type="checkbox"/> | <input type="checkbox"/> | On such real or personal property sales, did you receive 100% of proceeds in year of sale? |
| 104. | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or lease any assets for business use such as a vehicle, computer, office furniture, etc.? If yes, provide details. |
| 105. | <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire through gift or inheritance assets such as real estate, other tangible property, stocks, bonds or foreign or domestic mutual funds? If yes, please provide the Grantor’s cost basis. _____. |
| 106. | <input type="checkbox"/> | <input type="checkbox"/> | Did you sell any inherited or gifted property in 2023? |
| 107. | <input type="checkbox"/> | <input type="checkbox"/> | Did you do a “Like-Kind” exchange of real property in 2023? |
| 108. | <input type="checkbox"/> | <input type="checkbox"/> | Did you sell or abandon a home in 2023 that you claimed the First-Time Homeowners Credit when purchased? If yes, are you planning to purchase a home soon? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 109. | <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance a mortgage or take a home equity loan? If yes provide a copy of the closing statement. |

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| 110. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive or pay alimony or child support? If yes, circle which one. |
| 111. | <input type="checkbox"/> | <input type="checkbox"/> | Were you employed outside of your CT resident state and had days worked outside of your Non-CT “employment” state? |
| 112. | <input type="checkbox"/> | <input type="checkbox"/> | Were you the recipient of, or did you make a “below-market” or “interest free” loan? |
| 113. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any taxable gifts over \$17,000 (singly) or \$34,000 (jointly) during the year? |
| 114. | <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse have a financial interest in, or signature authority over, one or more foreign financial accounts (such as bank or securities accounts) at any time during 2023? If yes, what country? _____ Also, if yes, did the aggregate value of all your foreign accounts exceed \$10,000 at <u>any</u> time during 2023. <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 115. | <input type="checkbox"/> | <input type="checkbox"/> | Did you at any time during 2023 have an interest in or any authority over foreign accounts (for example, stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year? Be prepared to tell us about these. New laws have been passed concerning reporting requirements of Foreign Financial Assets. |
| 116. | <input type="checkbox"/> | <input type="checkbox"/> | Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust. |
| 117. | <input type="checkbox"/> | <input type="checkbox"/> | Did you buy items outside of CT or via the internet (for use in CT) on which CT sales tax was not paid? If yes, bring in details of items purchased. |
| 118. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any Federal or State estimated Tax Payments in 2023 or early 2024? If yes, bring support. We need to know the date and amount of each payment you made. Copies of cancelled checks, credit card statements or bank records work best. |
| 119. | <input type="checkbox"/> | <input type="checkbox"/> | Did your business use of equipment/autos fall below 50% in 2023? |
| 120. | <input type="checkbox"/> | <input type="checkbox"/> | As a business or rental property owner, were you required to file any 1099 MISC or 1099 NEC forms for 2023? If answered Yes, were they filed? Please circle YES or NO |
| 121. | <input type="checkbox"/> | <input type="checkbox"/> | Does any portion of your Form 1098 mortgage interest represent non-qualified home acquisition indebtedness such as borrowed funds used for debt consolidation, college education, auto purchase or vacation? If yes, what was the principal amount borrowed? _____ |
| 122. | <input type="checkbox"/> | <input type="checkbox"/> | As part of your data gathering process, do you have documented support in your records for the business, rental, and investment income and related business, rental and investment expenses that you have reported to me? |
| 123. | <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your income and/or deductions in 2024 to be materially different than those in 2023? If Yes, attach an explanation of the changes. You may need a pro-forma projection of next year’s tax that we can help you with. |
| 124. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income during the year that has not been addressed in this Organizer? |

Great job! Please remember to sign, date and deliver this document to us.