MARY KAY P.1

Please complete before your appointment

1. PERSONAL INFORM	ATION			FLIGONA							
Taxpayer					Spouse						
SSN or ITIN	DOB		Blind	Disabled	SSN or ITI	N		DOB		Blind	Disabled
Occupation					Occupatio	on					
Email		Phone			Email				Phone		
Street Address					City, State	e and Zip					
Foreign Country			Foreign P	rovince/Sta	te			Foreign P	ostal Code		
2. FILING STATUS											
□ Single		Married Fil	ing Joint		Married F	iling Sepa	rate		Head of Hou	usehold	
Qualifying V	Vidower		Check if a	nyone can o	claim you a	as a depen	ident on th	neir return			
3. DEPENDENTS					,						
Name				DOB				Child C	are Expenses	\$	
Disabled D FT	Student 🗆	SSN or ITIN							Grass Incomo	¢	
Name		55IN OF 111IN		DOB		Gross Income \$ Child Care Expenses \$					
									Gross Income		
Name				DOB		Child Care Expenses \$					
Disabled D FT	Student 🗆	SSN or ITIN							Gross Income	\$	
4. REFUND INFORMAT	ION										
Complete if you would	like your refu	nd deposite	d into you	ır bank acc	ount						
Bank Name								Type:	Checking		Savings
Routing Number						Account N	Number				
Name on Account					Ac	count out	side of the	US jurisd	ction?	□ Yes	□ No
5. HEALTH CARE INFOR	RMATION										
Please indictate where	you received y	our health i	nsurance	from for all	members	of your ta	ıx househc	old.			
🗆 Employer		Governme	nt-sponso	red Market	place			Private E	xchange		
Form re	ceived in mail:		1095-A		1095-B		1095-C				
6. MISCELLANEOUS PE	RSONAL INFO	RMATION Q	UESTION	<u>s</u>			7. COMM	ENTS			
				Taxpayer	Spouse						
1. Were you a victim of	-	-									
been contacted by		-									
 Were you a nonresident alien for any part of 2023? Have you received notice from the IRS/State in the 											
last three years?		insystate in	the								
4. Do you have children	n age 18 or und	ler (or stude	nt								
under 24) who had											
5. If your child(ren) are	-										
you elect to report d				_	_						
6. Did you give a gift over 7. If age 65 or older, do											
7. If age 65 or older, do you want to file Form 1040- SR for Seniors, instead of Form 1040?											

MARY KAY P.2

		NON-MAP	RY KAY IN	COME			
1. WAGE AND SALARY INFORMATION				2. INTER	EST & DIVIDEND INCOME		
Attach W-2's				Attach 10	99-NT, 1099-DIV or other statements		
Employer Name	Taxpayer	Spouse		Payer Na	me	Taxpayer	Spouse
	- □						
	-					-	
	. 🗆					-	
Unreported tip income: \$							
3. SCHEDULE K-A INCOME (1065, 1120-S & 1041	<u>)</u>			4. CAPIT	AL GAINS AND LOSSES		
Attach K-1s				Attach 10	99-Bs		
Payer Name	Taxpayer	Spouse		Payer Na	me	Taxpayer	Spouse
				- ,			
5. RETIREMENT DISTRIBUTIONS					6. OTHER INCOME		
Attach 1099-R & 5498 and SSA 1099 or RRB 1099					State Income Tax Refund	\$	
Payer Name	Taxpayer	Spouse	Roth IRA	Trad. IRA	Alimony Received		
					Date of divorce/separation		
	-				Unemployment		
					Gambling Winnings	\$	
					Scholarships & Grants	\$	
Did you receive social security benefits?					Jury Pay	\$	
Did you receive railroad retirement?					Child Support	\$	
					Hobby Income		
7. MISCELLANEOUS INCOME QUESTIONS					NOL Carryforward	\$	
1. Did you sell your home?			Yes 🗆	No 🗆	Other	\$	
2. Did you earn any foreign income or pay any fo			Yes 🗆	No 🗆			
3. Do you have a health savings account, Archer	MSA, or Me	dicare	Yes 🗆	No 🗆			
Advantage? 4. Did you have a financial account ina foreign c	ountry (i.o.	hank					
account)?	builti y (i.e.	Dalik	Yes 🗆	No 🗆			
			Yes 🗆	No 🗆			
If yes, did the aggregate value of all financial accounts	exceed \$10k a	t any time?					
5. Did you have any debt forgiven (i.e. student loans, mortgage, etc.)?			Yes 🗆	No 🗆			
6. Did you receive (reward, award, etc.) or sell, exchange, gift or			V 🗖				
otherwise dispose of a digital asset or financial ir	nterest?		Yes 🗆	No 🗆			
8. COMMENTS							

859-519-6164

□ Yes 🗆 No Use Wholesale Numbers EXCEPT with sales total (sales total = retail + sales tax) **1. MARY KAY INCOME** 2. MARY KAY COST OF GOODS SOLD Report wholesale numbers i.e. your cost Total Sales: \$ Add all pink tickets (without sales tax) OR add totals from Beginning Inventory weekly sales reports. Be sure to include sales to other If your first year, beginning inventory will be zero. If not, this amount will be Consultants. last year's ending inventory. Commission Checks: \$ You should receive a Form 1099-MISC from Mary Kay. Section 1 Purchases From packing slip, plus merchandise purchased from other consultants. Prizes: \$ Cash value will be included on From 1099-MISC. Personal Use Product Total cost (your cost) of products taken out of inventory for personal use Returns or Refunds (Retail): \$ and/or for gifts to family and friends. Total amount, that has been included as income, you refunded a customer (i.e. you sold an ivory powder, a week Ending Inventory later you exchange it (slightly used) for a beige powder). This \$ *Count each item on your shelf for resale and price each according to its'* is only if you do NOT return the used product to MK for a wholesale cost refund. Uncollected or Bad Checks: \$___ Cost of Labor Ś Be sure total amount of sale is included in total sales. Wages paid for secretarial and office assistance.

3. EXPENSES

Total Mary Kay Income: \$_____

refunds and uncollected or bad checks

Advertising	\$	Supplies - Retail Cost ^{\$}					
Business cards, event booths, product samples, non MK prizes, etc.		Total of all section 2 items purchased PLUS various supply items such as					
Bank Charges	\$	cotton balls, washrags, cost of starter kit, packaging materials, ribbons, baskets, training CDs, etc.					
Monthly service fee, money orde	er fees, annual dues, etc.	Meals and Entertainment ^{\$}					
Dues and Subscriptions	\$	Itemized receipts are required for business meals over \$25. Documented proc					
•	ss magazines, business apps, etc.	 of the date, time, place and business purpose, as well as the individuals attending, is required by the IRS. 					
Insurance	\$	Travel *worksheet on next page \$					
Product replacement insurance,	self-employed health insurance, etc.	Expenses to travel to another town to recruit or speak at another MK event,					
Interest Paid	\$	registration fees, lodging, transportation, parking, taxis, Seminar and Conference associated costs, etc.					
Interest paid on business loans o	and credit cards, etc.	Telephone & Internet					
Legal & Professional Fees	\$	Do you have a line dedictated to MK?					
Business related legal and accou	inting fees, tax preparation fees, etc.	If yes, monthly rate for dedicated line:					
Office Supplies & Equipment	\$	If no, monthly rate for household line:					
Pens, paper, desk, calculator, co	mputer/tablet, etc.	% of bill used for MK					
Rent on Business Property	\$	Other (describe)					
Rental/lease of business propert	ty and fees on office equipment.	7					
Hostess Gifts	\$						

MAS TAX ORGANIZER TAX YEAR 2023

Mary Kay Beauty Consultant/Director:

MARY KAY P.3

□ Joint

MARY KAY INCOME AND EXPENSES □ Spouse

□ Taxpayer

Did you start or acquire this business during 2023?

This is the total of the above numbers, minus the returns or

MARY KAY P.4

MARY KAY INCOME AND EXPENSES (Continued)

1. HOME OFFICE EXPENS	iES	2. AUTOM	IOBILE EX	(PENSES			
VALUATION OF HOME		Daily log	or calena	lar showing	g date, destination, rea	son, and total	miles required by IRS
Purchase Price	\$	Year, Mak	e and Mo	del:			
Purchase Date	/ /						
Total Sq. Ft.		Total Miles	Driven:		Total Miles Driven for	MK Purposes:	Date Began Driving for MK:
Total Sq. Ft. used ONLY	\$						IVIR.
for MK		Fuel, oil, e	tc.	\$		Car Washes	\$
Land Value	\$	Repairs		\$		Parking Fees	\$
Repairs & Maint.	\$	Lease Payr	ments	\$		e of Purchase	/
Mtg. Interest	\$	Auto Insur	ance			urchase Price	\$
Property Taxes	\$	Tags & Lice	ense	\$		lew or Used?	
Insurance s	\$						
Utilities <u>s</u>	\$						
Rent Paid if not owned							
	\$						
3. FOR DIRECTORS							
Mary Kay Automobile Ye	ar, Make & Model:			Mone	ey from consultants fo	or events, etc.	\$
				Fees f	or meeting rooms, wo	orkshops, etc.	\$
Date received:	/ /				Con	sultant Prizes	\$
Taxable value of MK Auto	omobile as shown on N	/lary Kay Form 1099-		Outso	urcing (UnitWise, Nev	vsletter, etc.)	\$
MISC:					C	Director's Suit	; \$
					Other Mi	sc. (describe)	\$
			_				
	C	Mary Kay Busine					14/
	Seminar	Leadership Confe	rence	Ca	reer Conference		Workshop
Location							
Registration Fees							
Transportation							
Lodging							
Parking, Taxis, Tolls							
Telephone							
Dry Cleaning							
Miscellaneous							

MARY KAY P.5

			DEDUC	TIONS							
1. EDUCATION											
Attach 1098-Ts, 1098-Es c	and 1099-Qs										
Student 1 Name				Educational Inst.:							
Tuition & fees	Loan Interes	t Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$\$										
Student 2 Name				Educatior	nal Inst	.:					
Tuition & fees	Loan Interes	t Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$		\$								
Student 3 Name				Educatior	nal Inst	.:					
Tuition & fees	Loan Interes	t Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$		\$								
2. JOB-RELATED MOVI	NG EXPENSES						<u>3. IR</u>	A CON	TRIBUTIO	<u>DNS</u>	
Lodging <u>\$</u>			Miles from old home to new	/ work			Cont	ributior	ns to	¢	
Fuel <u>\$</u>		_	Miles from old home to old	l work		traditional IRA					
Mileage \$		_	Member of Armed Fe	orces? 🗆 Yes		No	Cont	ributior	ns to	¢	
Other \$							ROTH	l or IRA		ې	
4. OTHER DEDUCTIONS	<u>S</u>										
Educator Expenses		\$		Alimony	Paid			¢	5		
Health Savings Account	t Contr.	\$		Date of	divor	ce/se	<i>b</i> .			/	/
Archer Medical Savings	s Contr.	\$		Qualified business net <u>\$</u>							
Jury duty repymt to em	nployer	\$		loss carryover from 2022							
Foreign qualified housi	ng exp.	\$		Qualified REIT dividends \$							
Contr. To 529 College P	lan	\$		& PTP net loss carryover from 2022							
5. MISCELLANEOUS DE	DUCTION QU	ESTION	<u>s</u>								
1. Did you purchase an	item(s) in 202	3 in wh	ich you paid a large sales tax?					Yes	🗆 No)	
2. Did you purchase (No	OT lease) an e	lectric c	or plug-in hybrid vehicle during	g 2023?				Yes	🗆 No)	
a. Did you receive t	he EV tax crec	lit as an	instant discout at the dealers	hip?				Yes	🗆 No)	
b. Please list the ye	b. Please list the year, make and model:										
3. Did you refinance a r	mortgage duri	ng 2023	?					Yes	🗆 No)	
6. COMMENTS											

I

MARY KAY P.6

ID # Amount Paid S Tax Exempt? Yes No ID # Address Phone Phone Phone ID # Amount Paid S Tax Exempt? Yes No ID # Amount Paid S Tax Exempt? Yes No ID # Amount Paid S Tax Exempt? Yes No ID # Amount Paid S Tax Exempt? Yes No 2. RESIDENTIAL ENERGY CREDIT Metal or ashphalt roof S Solar water heating S Solar water heating S Electric heat pump or central AC S Solar water heating S Electric heat pump or central AC S Natural gas, propane or oil furnace S Solar water heating S Surf electric property S Biomass fuel stove S Natural gas, propane or oil furnace S Solar water heating S Insultion material S Advanced main air circulating fan S No Solar water Natural gas, propane or oil furnace S 2. Were any improvements related to the construction of this main home? Yes No No 3. ESTIMATED TAX PAYMENTS I. Did you pay expenses related to the Yes No Date Paid Amount Paid 2. Are you curnethy repaying the First- Yes No StortR / S Solar water asolal security number Yes No Date Paid A	1. CHILD CARE CREDIT									
ID # Amount Paid 5 Tax Exempt? yes No Provider Name Address Phone ID # Amount Paid 5 Tax Exempt? yes No ID # Amount Paid 5 Tax Exempt? yes No ID # Address Phone ID # ID # ID # Address Phone ID # ID # ID # ID # Address Phone ID #	Attach Daycare Provider	Statement(s)				•				
Provider Name Address Phone ID # Amount Paid \$ Tax Exempt? Yes No Provider Name Address Phone Interface Phone ID # Amount Paid \$ Tax Exempt? Yes No 2. RESIDENTIAL ENERGY CREDT Solar electric reporty \$ Solar electric reporty \$ Metal or ashphalt roof \$ Solar water heating \$ Electric heat pump or central AC \$ Small wind energy \$ Electric heat pump or central AC \$ Small wind energy \$ Natural gas, propane or oil furnace \$ Fuel cell property \$ Natural gas, propane or oil furnace \$ Staterior doors \$ Advanced main air circulating fan \$ 1. Were the qualified improvements for your main home in the United States? Yes No 2. Wree any improvements related to the construction of this main home? Yes No 2. Were any improvements related to the construction of this main home? 10 id you pay expenses related to the Yes No 2. StriMACE DA PAYMENTS 4. MiscetLANEOUS CREDT Quertions It were you issued a Mortgage Credit? No 3rd QTR / \$ 3. Do you have a social electric? No 2rd QTR / \$ Amount Paid 1st QTR /<	Provider Name			Address		Phone				
ID # Amount Paid \$ Tax Exempt? Yes No Provider Name Address Phone Phone No ID # Amount Paid \$ Tax Exempt? Yes No 2. RESIDENTIAL ENERGY CREDIT Star electric property \$ Tax Exempt? Yes No Solar vater heating \$ Exterior windows and skylights \$ S <	ID #		Amount Pa	aid \$		Tax Exempt?		Yes □No		
Provider Name Address Phone ID # Amount Paid \$ Tax Exempt? Yes □No 2. RESIDENTIAL ENERGY CREDIT	Provider Name			Address		Phone				
Provider Name Address Phone ID # Amount Paid \$ Tax Exempt? Yes □No 2. RESIDENTIAL ENERGY CREDIT						_				
ID # Amount Paid \$ Tax Exempt? YesNo 2. RESIDENTIAL ENERGY CREDIT			Amount Pa					Yes □No		
2. RESIDENTIAL ENERGY CREDIT Solar electric property \$ Solar water heating \$ Insulation material \$ Solar water heating \$ Advanced main air circulating fan \$ 1. Were the qualified inprovements for your main home in the United States? <	Provider Name			Address		Phone				
2. RESIDENTIAL ENERGY CREDIT Solar electric property \$ Solar water heating \$ Insulation material \$ Solar water heating \$ Advanced main air circulating fan \$ 1. Were the qualified inprovements for your main home in the United States? <										
Solar electric property S Metal or ashphalt roof s Solar water heating S Exterior windows and skylights s Small wind energy S Electric heat pump or central AC s Solar mater heat pump S Natural gas, propane/oil water heater s Geothermal heat pump S Biomass fuel stove s Insulation material S Advanced main air circulating fan s 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS I. Oid you pay expenses related to the FEDERAL (Applied from 2022 federal refund) Amount Paid 1. Oid you pay expenses related to the Yes No 3rd QTR / / S 3. Do you have a social security number Yes No Statt (Applied from 2022 state refund) Amount Paid 4. Were you susued a Mortgage Credit Yes No Statt Name / / S S Amount Paid Statt Riame // S S Metal or ashphalt roof s No Certificate (MCC)? S State Name Amount Paid Amount Paid State Name //	ID #		Amount Pa	aid Ş		Tax Exempt?		Yes □No		
Solar water heating \$ Exterior windows and skylights \$ Small wind energy \$ Electric heat pump or central AC \$ \$ Geothermal heat pump \$ Natural gas, propane/oil water heater \$ \$ Fuel cell property \$ Biomass fuel stove \$ \$ Insulation material \$ Natural gas, propane or oil furnace \$ \$ 2. Were any improvements for your main home in the United States? Yes No 3. EstimArtED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS \$ FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No 3. StriMArtED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS \$ FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No 3. d QTR / \$ 3. Do you have a social security number Yes No 2. Are you currently repaying the First- Yes No Cartificate (MCC)? No Cartificate (MCC)? STATE (Applied from 2022 istate refund) Amount Paid 4. Were you issued a Mortgage Credit Yes No Certificate (MCC)? State Name 1	2. RESIDENTIAL ENERG	<u>SY CREDIT</u>								
Small wind energy \$ Electric heat pump or central AC \$ Geothermal heat pump \$ Natural gas, propane/oil water heater \$ Fuel cell property \$ Biomass fuel stove \$ Insulation material \$ Natural gas, propane or oil furnace \$ Exterior doors \$ Advanced main air circulating fan \$ 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. <u>SETIMATED TAX PAYMENTS</u> 4. MISCELLANEOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No 1st QTR / \$ 3. Do you have a social security number Yes No 2nd QTR / \$ 3. Do you have a social security number Yes No Certificate (MCC)? STATE (Applied from 2022 state refund) Date Paid Amount Paid 4. Were you issued a Mortgage Credit Yes No STATE (Applied from 2022 state refund) Date Paid Amount Paid Certificate (MCC)? Certificate (MCC)? Stat R Name / \$ S S	Solar electric property	\$			Metal or ashphalt root	f <u>\$</u>				
Geothermal heat pump \$ Natural gas, propane/oil water heater \$ Fuel cell property \$ Biomass fuel stove \$ Insulation material \$ Natural gas, propane or oil furnace \$ Exterior doors \$ Advanced main air circulating fan \$ 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4. MISCELLANCOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 fedral refund) adoption of an eligible child? No 2. Are you currently repaying the First- Yes No 2. Are you currently repaying the First- Yes No 2. Are you currently repaying the First- Yes No 2. Are you currently repaying the First- Yes No 2. Are you currently repaying the First- Yes No 2. And QTR / \$ 3. Do you have a social security number Yes No 2. Are you currently repaying the First- Yes No Certificate (MCC)? STATE (Applied from 2022 tate refund) Amout Paid </td <td>Solar water heating</td> <td>\$</td> <td></td> <td></td> <td>Exterior windows and skylights</td> <td>s <u>\$</u></td> <td></td> <td></td>	Solar water heating	\$			Exterior windows and skylights	s <u>\$</u>				
Fuel cell property § Biomass fuel stove § Insulation material § Natrual gas, propane or oil furnace § Exterior doors \$ Advanced main air circulating fan \$ 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4.MISCELLANEOUS CREDIT QUESTIONS Individual gas, propane or oil furnace FEDERAL (Applied from 2022 federal refund) Amount Paid 1. Did you pay expenses related to the Yes No 2. Are you currently repaying the First- Yes No No Individual gas, propane or oil furnace 3. To QTR / \$	Small wind energy	\$			Electric heat pump or central AC	<u>\$</u>				
Insulation material S Natrual gas, propane or oil furnace Exterior doors S Advanced main air circulating fan 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 federal refund) Date Paid Amount Paid 1. Did you pay expenses related to the Yes No 1st QTR / / S 2. Are you currently repaying the First. Yes No 2nd QTR / / S 3. Do you have a social security number Yes No 3tt QTR / / S 3. Do you have a social security number Yes No stat QTR / / S 3. Do you have a social security number Yes No stat QTR / / S S 3. Do you have a social security number Yes No stat QTR / / S S S S S Add QTR / / S S S S S State Name Inst QTR / S S S	Geothermal heat pump	\$		Nat	tural gas, propane/oil water heater	r \$				
Exterior doors \$ Advanced main air circulating fan \$ 1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No Date Paid Amount Paid 1. Did you pay expenses related to the Yes No 3rd QTR / \$ 3. Do you have a social security number Yes No 3rd QTR / \$ 3. Do you have a social security number Yes No 1st QTR / \$ 4. Mount Paid 4. Were you issued a Mortgage Credit Yes No 1st QTR / \$ \$ S No Certificate (MCC)? No 1st QTR / \$ \$ S No Certificate (MCC)? Certificate (MCC)?	Fuel cell property	ell property \$			Biomass fuel stove	\$				
1. Were the qualified improvements for your main home in the United States? Yes No 2. Were any improvements related to the construction of this main home? Yes No 3. ESTIMATED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS Indication of an eligible child? FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No Date Paid Amount Paid 1. Did you pay expenses related to the Yes No 1. St QTR / \$ 2. Are you currently repaying the First- Yes No 2nd QTR / \$ 3. Do you have a social security number Yes No 3rd QTR / / \$ 3. Do you have a social security number Yes No 4th QTR / \$ 3. Do you have a social security number Yes No Att is valid & allows you to work? 1st QTR / \$ \$ \$ Were you issued a Mortgage Credit Yes No 1st QTR / \$ \$ \$ \$ \$ No \$ 2nd QTR / / \$ \$ \$ \$ \$ \$ \$	Insulation material				Natrual gas, propane or oil furnace \$					
1. Were the qualified information in the onited states: Image: Construction of this main home? Image: Construction of this main home? 2. Were any improvements related to the construction of this main home? Image: Construction of this main home? Image: Construction of this main home? 3. ESTIMATED TAX PAYMENTS 4. MISCELLANEOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes In No In adoption of an eligible child? 2. Are you currently repaying the First- Yes In No In adoption of an eligible child? 2. Are you currently repaying the First- Yes In No In adoption of an eligible child? 2. Are you currently repaying the First- Yes In No In this is valid & allows you to work? 3. Do you have a social security number Yes In No In this is valid & allows you to work? 4th QTR / \$ 3rd QTR / \$ Date Paid Amount Paid 1st QTR / \$ 2nd QTR / \$ 2nd QTR / \$ 2nd QTR / \$ 2nd QTR / \$ Jate Paid Amount Paid Ist QTR / \$ QTR / <td colspan="3">Exterior doors \$</td> <td></td> <td>Advanced main air circulating far</td> <td>n \$</td> <td></td> <td></td>	Exterior doors \$				Advanced main air circulating far	n \$				
4. MISCELLANEOUS CREDIT QUESTIONS FEDERAL (Applied from 2022 federal refund) Date Paid Amount Paid 1st QTR / \$ 2nd QTR / \$ 3rd QTR / \$ STATE (Applied from 2022 state refund) Amount Paid 1st QTR / \$ 2nd QTR / \$ 3rd QTR / \$ 2nd QTR / \$ 3rd QTR / \$ 3rd QTR / \$ 2nd QTR / \$ 3rd QTR / \$ Joate Paid Amount Paid 1st QTR / \$ Joate Paid Amount Paid 1st QTR </td <td>1. Were the qualified in</td> <td>nprovements for you</td> <td>ır main home in</td> <td>the United States</td> <td>s? 🗆 Yes</td> <td>🗆 No</td> <td></td> <td></td>	1. Were the qualified in	nprovements for you	ır main home in	the United States	s? 🗆 Yes	🗆 No				
FEDERAL (Applied from 2022 federal refund) 1. Did you pay expenses related to the Yes No Date Paid Amount Paid 1st QTR / 1/ \$ 2nd QTR / 1/ \$ 3rd QTR / 1 \$ STATE (Applied from 2022 state refund) Date Paid Amount Paid 1st QTR / 1/ \$ 3rd QTR / 1/ \$ 3rd QTR / 1/ \$ 3rd QTR / 1st QTR / 1/ \$ 2nd QTR / 1// \$ 2nd QT	2. Were any improvem	ents related to the co	onstruction of th	is main home?	□ Yes	🗆 No				
Date Paid Amount Paid adoption of an eligible child? 1st QTR / \$ 2. Are you currently repaying the First- Yes No time Homebuyer Credit? 3rd QTR / / \$ 3rd QTR / / \$ TATE (Applied from 2022 state refund) That is valid & allows you to work? No STATE (Applied from 2022 state refund) Amount Paid 4. Were you issued a Mortgage Credit Yes No 1st QTR / / \$. . 3rd QTR / / \$. . 1st QTR / \$. . . UCAL (Applied from 2022 local refund) Date Paid Amount Paid . . State Name LOCAL (Applied from 2022 local refund) Amount Paid . . . 1st QTR / . \$. . Aft QTR / 2nd QTR / Jate Paid Amount Paid Ist QTR / Jad QTR	3. ESTIMATED TAX PA	YMENTS			4. MISCELLANEOUS CREDIT	QUESTIONS				
1st QTR / / \$ 2nd QTR / / \$ 3rd QTR / / \$ 3rd QTR / / \$ 4th QTR / / \$ STATE (Applied from 2022 state refund) that is valid & allows you to work? No □ STATE (Applied from 2022 state refund) Amount Paid 1st QTR / \$ 2nd QTR / \$ 2nd QTR / \$ 2nd QTR / \$ 2nd QTR / \$ State Name E LOCAL (Applied from 2022 local refund) Amount Paid 1st QTR / \$ Date Paid Amount Paid 1st QTR / / \$ Out (Applied from 2022 local refund) Amount Paid Date Paid Amount Paid 1st QTR / / \$ 2nd QTR / / \$ State Name E LOCAL (Applied from 2022 local refund) Date Paid Amount Paid 1st QTR / / \$ 2nd QTR / / \$ <	FEDERAL (Applied from						Yes 🗆	No 🗆		
2nd QTR / / / ime Homebuyer Credit? 3rd QTR / / \$ ith is valid & allows you to work? 4th QTR / / \$ that is valid & allows you to work? STATE (Applied from 2022 state refund)		Date Paid		mount Paid			. –			
3rd QTR / / \$ 3rd QTR / / \$ 4th QTR / / \$ STATE (Applied from 2022 state refund) 4. Were you issued a Mortgage Credit Yes No Amount Paid 1st QTR / / 1st QTR /		/ /				the First-	Yes 🗆	NO 🗆		
4th QTR / / \$ STATE (Applied from 2022 state refund) Date Paid Amount Paid Date Paid Amount Paid 4. Were you issued a Mortgage Credit Yes 1st QTR / / \$ 2nd QTR / / \$ 3rd QTR / / \$ 4th QTR / \$ State Name Date Paid Amount Paid 1st QTR / \$ DATE Paid Amount Paid 1st QTR / \$ QTR / \$ 1st QTR / \$ 2nd QTR / \$ Amount Paid \$ 1st QTR / \$ QTR / \$ 2nd QTR / \$ 1st QTR / \$ 2nd QTR / \$ Amount Paid \$ 1st QTR / \$ 2nd QTR / \$ 3rd QTR / \$ 2nd QTR / \$ 4th QTR / \$		/ /				.				
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Date Paid Amount Paid Certificate (MCC)? 1st QTR / \$ 2nd QTR / / \$ 3rd QTR / / \$ 4th QTR / / \$ 4th QTR / / \$ State Name		2 state refund)	Ŷ				Yes 🗆	No 🗆		
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1st QTR / / \$ 2nd QTR / / \$ 3rd QTR / / \$ 4th QTR / / \$	LOCAL (Applied from 20.		Δ	mount Paid						
2nd QTR / \$ 3rd QTR / \$ 4th QTR / \$	1st QTR	/ /								
3rd QTR / / \$ 4th QTR / / \$		/ /								
4th QTR / / \$	3rd QTR	/ /								
	4th QTR	/ /								
Locality Name	Locality Name									

ARITABLE CONTRIBUTIONS

MARY KAY P.7

	ARITABLE CONTRIBUTI	UNS	
1. CHARITABLE CONTRIBUTIONS TOTALING OVER \$250 FOR	2023		
ONLY COMPLETE IF YOU DONATED MORE THAN \$	250 FOR THE YEAR; OT	THERWISE THE STAND	ARD DEDUCTION WILL APPLY
Attach receipts of contributions totaling over \$250 for 2023			
	Тах		
Organization Name	Exempt	Date of contr.	Amount Paid
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		/ /	\$
		Total \$	

Please see the following checklist for documents and information to bring with you to your appointment:

Last year's tax return not prepared in our office (Federal, State & Local)

- □ Social security cards for each person
- Current driver's license for each adult
- □ W-2s
- □ 1099s for Interest and Dividends
- □ 1099Bs or year end investment statements
- □ Stock/bond transaction information if not included on year end 1099B
- □ Information regarding State or Local overpayment of prior year taxes
- □ Information regarding sale of any investment property or stock
- □ K1s received from any corporations, partnerships, etc.
- □ Unemployment statement 1099G
- □ Social Security Statement
- \Box IRA/pension or retirement distribution information
- □ IRA rollover/conversion information
- □ Student loan interest information (this may be on a 1098)
- □ Education credit information
- Childcare information including name, address, phone, EIN and amounts paid
- □ Settlement papers from buying or selling home