FARM P.1

Please complete before your appointment

			PERSONAL	INFORMAT	ΓΙΟΝ					
1. PERSONAL INFORMATION										
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	and Zip			1		
Foreign Country		Foreign P	rovince/State	9			Foreign P	ostal Code		
2. FILING STATUS										
□ Single	☐ Married Fil	ing loint	П	Married F	iling Sen	arate	П	Head of Ho	usehold	
☐ Qualifying Widower		_	nyone can cl						2001.010	
3. DEPENDENTS		CHECK II G	nyone can ci	ann you as	a acpen	ident on the	Ten return			
Name			DOB				Child Ca	are Expenses	\$	
									<u>'</u>	
Disabled ☐ FT Student ☐	SSN or ITIN		_					iross Income		
Name			DOB				Child Ca	are Expenses	\$	
Disabled ☐ FT Student ☐	SSN or ITIN						G	iross Income	Ś	
Name	5511 01 11111		DOB					are Expenses		
								·		
Disabled ☐ FT Student ☐	SSN or ITIN						G	iross Income	\$	
4. REFUND INFORMATION										
Complete if you would like your re	efund deposited	d into you	r bank accou	nt						
Bank Name							Type:	Checking		Savings
Routing Number					Account I	Number	-			
Name on Account				Acc	ount out	side of the	e US jurisd	iction?	□ Yes	□ No
5. HEALTH CARE INFORMATION										
Please indictate where you receive	ed your health i	nsurance	from for all n	nembers o	f your ta	x househo	old.			
☐ Employer	☐ Governmer	nt-sponsor	ed Marketpl	ace			Private Ex	change		
Form received in m	nail:	1095-A		1095-B		1095-C				
6. MISCELLANEOUS PERSONAL IN	IFORMATION Q	UESTIONS	<u> </u>			7. COMM	<u>ENTS</u>			
			Taxpayer	Spouse						
1. Were you a victim of identity th	-									
been contacted by the IRS? If 2. Were you a nonresident alien for										
3. Have you received notice from	* *									
last three years?		-	_	_						
4. Do you have children age 18 or	under (or stude	ent								
under 24) who had unearned			_	_						
If your child(ren) are required to you elect to report dividends & ir										
6. Did you give a gift over \$16,000 to										
7. If age 65 or older, do you want										

SR for Seniors, instead of Form 1040?

		IN	COME				
1. WAGE AND SALARY INFORMATION				2. INTERI	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)	1			4. CAPITA	AL GAINS AND LOSSES		
Attach K-1s				Attach 10	99-Bs		
	Тампамал	Caarraa				Taymayan	Cmausa
Payer Name	Taxpayer	Spouse		Payer Na	me	Taxpayer	Spouse
	. –						
C DETIDEMENT DISTRIBUTIONS	_	_			C OTHER INCOME		_
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 for			Yes □	No □			
3. Do you have a health savings account, Archer N	MSA, or Med	dicare	Yes □	No □			
Advantage? 4. Did you have a financial account ina foreign co	untru (i o h	ank					
account)?	ountry (i.e. t	Jaiik	Yes □	No □			
If yes, did the aggregate value of all financial accounts	exceed \$10k a	t any time?	Yes □	No □			
5. Did you have any debt forgiven (i.e. student loans, mortgage, etc.)?			Yes □	No □			
Did you receive (reward, award, etc.) or sell, ex otherwise dispose of a digital asset or financial in		. UI	Yes □	No □			
8. COMMENTS							

		FARM INCOM	E AND E	XPENSES			
1. INCOME				2. EXPENSES			
Total of livestock purc	hased for resell	\$		Chemicals		\$	
	Original Price	\$		Conservation expenses		\$	
	Selling Price	\$		Employee benefits		\$	
Sales of livestock, pro	duce, grains, etc.	\$		Feed		\$	
Agriculture program p	ayments received	\$		Fertilizers and lime		\$	
Custom hire income		\$		Farm insurance		\$	
Other income		\$		Freight and trucking		\$	
		\$		Fuel/oil		\$	
			_	Interest on farm purches		\$	
3. VEHICLE EXPENSES				Mortgage insurance		\$	
Year	Make & Mode			Labor paid		\$	
Purchase dat	re Price	\$		Rent paid on land		\$	
	Insurance			Repairs & maintenance or	າ equip.	\$	
				Seeds and plants		\$	
Repairs	& Maintenance \$			Storage and warehouse		\$	
			_	Supplies *		\$	
4. BUSINESS USE OF H	<u>IOME</u>			Vet expenses		\$	
Sq. ft. used for	Casualty losses	\$		Breeding expenses		\$	
business	Mortgage interest	\$		Depreciation		\$	
Total sq. ft. of home	Real estate taxes	\$		Other		\$	
	Insurance	\$					
Was home used as	Repairs & aint.	\$		* EXAMPLES OF F	ARMING SUPPI	LY DEDUCT	TIONS
daycare?	Utilities & other	\$		Appointment books	Litter/bedo	ding	Paper
Date started service	Rent	\$		Security system	Calendar		Mowers
	FMV of home	\$		Small tools	Clippers		Pesticides
	Value of land	\$		Steel toe boots	Toolbox		Trash bags
Carryover of unallowe	d expenses?	\$		Milk assessments	Farm maga	azines	
5. ASSET DEPRECIATION	<u>ON</u> (farm equipment and ve	ehicles)					
Assets Purchased	Date	Purchase Price	Asset	s Sold/Disposed of	Date	Purc	hase Price
	/ /	\$			/ /	\$	
	/ /	\$			/ /	\$	
	/ /	\$			/ /	\$	
	/ /	\$			/ /	\$	
1	, ,				, ,		ŀ

			DEDUCTIONS	.								
1. EDUCATION												
Attach 1098-Ts, 1098	3-Es and 1099-Qs											
Student 1 Name				Education	al Ins	t.:						
Tuition & fees	Loan Interest	Paid	Supplies & Books		FR	SO	JR	SR	Oth	er	529 Plan	
\$	\$		\$							l		
Student 2 Name				_ Education	al Ins	t.:						
Tuition & fees	Loan Interest	Paid	Supplies & Books		FR	SO	JR	SR	Oth	er	529 Plan	
\$	\$		\$							l		
Student 3 Name				Education	al Ins	t.:						
Tuition & fees	Loan Interest	Paid	Supplies & Books	_	FR	SO	JR	SR	Oth	er	529 Plan	
\$	\$		\$							l		
2. JOB-RELATED M	OVING EXPENSES						3. IF	RA CON	ITRIBU	JTIOI	NS	
Lodging \$			Miles from old home to new work	<			Cont	ributio	ns to		A	
Fuel \$			Miles from old home to old work	<			tradi	itional I	RA	\$		
Mileage \$			Member of Armed Forces?			l No	Cont	ributio	ns to			
Other \$							ROT	H or IR	A		\$	
4. OTHER DEDUCTI	ONS											
Educator Expenses	 -	\$		Alimony	Paid				\$			
Health Savings Account Contr. \$				Date of		ce/se	p.	-	-		/	
Archer Medical Savings Contr. \$				Qualified business net \$						- ·		
Jury duty repymt to	-	\$		loss carryover from 2022								
Foreign qualified ho	-	<u>;</u> \$		- Qualified REIT dividends \$								
Contr. To 529 Colle	-	<u>;</u> \$		& PTP ne								
5. MISCELLANEOUS												
			ch you paid a large sales tax?					Yes		No		
2. Did you purchase (NOT lease) an electric or plug-in hybrid vehicle during 2023?												
a. Did you recei	a. Did you receive the EV tax credit as an instant discout at the dealership?											
b. Please list th	e year, make and m	nodel:										
3. Did you refinance	-		?					Yes		No		
6. COMMENTS												

				CREDITS AND PA	NYMENTS							
1. CHILD CARE CREDIT												
Attach Daycare Provider S	Statemen	t(s)										
Provider Name				Address		Phone						
ID# Amount Pa				nt Paid \$		Tax Exempt?		Yes □No				
Provider Name			•	Address		Phone						
ID#			Amou	nt Paid \$		Tax Exempt?		Yes □No				
Provider Name			•	Address		Phone						
ID#			Amou	nt Paid \$		Tax Exempt?		Yes □No				
2. RESIDENTIAL ENERG	Y CREDI	T										
Solar electric property	\$	_			Metal or ashphalt roof	\$						
Solar water heating	\$			<u> </u>	Exterior windows and skylights	\$						
Small wind energy	\$				Electric heat pump or central AC	\$						
Geothermal heat pump	\$			 Nat	ural gas, propane/oil water heater	\$						
Fuel cell property	\$				Biomass fuel stove	\$						
Insulation material	\$				Natrual gas, propane or oil furnace \$							
Exterior doors	\$			<u></u>	Advanced main air circulating fan							
1. Were the qualified ir	nprovem	nents for y	our main home	 e in the United States	? □ Yes	□ No						
2. Were any improvem	ents rela	ted to the	construction o	of this main home?	☐ Yes	□ No						
3. ESTIMATED TAX PAY	MENTS				4. MISCELLANEOUS CREDIT C	QUESTIONS						
FEDERAL (Applied from 2	2022 fede	ral refund)	1		1. Did you pay expenses relate		Yes □	No □				
	Date P	aid		Amount Paid	adoption of an eligible chil							
1st QTR	/	/	\$		2. Are you currently repaying t	he First-	Yes □	No □				
2nd QTR	/		\$		time Homebuyer Credit?			=				
3rd QTR	/		\$		3. Do you have a social security that is valid & allows you t	,	Yes 🗆	No □				
4th QTR STATE (Applied from 202	2 state re	/	\$		4. Were you issued a Mortgage		Yes □	No □				
	Date P			Amount Paid	Certificate (MCC)?	: Credit	ies 🗆	NO L				
1st QTR	/	/	\$, ,							
2nd QTR	/	/	\$									
3rd QTR	/	/	\$									
4th QTR	/	/	\$									
State Name												
LOCAL (Applied from 202												
4 . 0==	Date P	aid	_	Amount Paid								
1st QTR			\$		$\overline{}$							
2nd QTR	/		\$ \$		_							
3rd QTR 4th QTR	/		\$ \$									
Locality Name		,	٠,		\dashv							

CHAR	ITABLE CONTRIBUTION	ONS	
1. CHARITABLE CONTRIBUTIONS TOTALING OVER \$250 FOR 20	23		
ONLY COMPLETE IF YOU DONATED MORE THAN \$25	60 FOR THE YEAR; 01	THERWISE THE STANDA	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 in ☐ Last year's tax return not prepared in our off ☐ Social security cards for each person ☐ Current driver's license for each adult ☐ W-2s ☐ 1099s for Interest and Dividends	-		ppointment:

se	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
	☐ 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