SALON P.1

Please complete before your appointment

PERSONAL INFORMATION

1. PERSONAL INFORMA	TION										
Taxpayer					Spouse						
SSN or ITIN	DOB		Blind	Disabled	SSN or IT	IN		DOB		Blind	Disabled
Occupation					Occupatio	on					
Email		Phone			Email				Phone		
Lindi		Thone			Linan				Thome		
Street Address					City, State	e and Zip					
Foreign Country			Foreign Pi	rovince/Sta	ite			Foreign P	ostal Code		
2. FILING STATUS								•			
□ Single		Married Fil	ing loint		Married F	iling Sena	rate		Head of Ho	usehold	
_			-							uscholu	
Qualifying W	luowei		CHECK II a	nyone can	cialifi you	as a uepei	luent on t	nen returi	•		
3. DEPENDENTS Name				DOB				Child C	are Expenses	ć	
Name				DOB				crinic ca	аге схрепзез	Ş	
Disabled D FT	Student 🗆	SSN or ITIN						G	iross Income	\$	
Name				DOB				Child Ca	are Expenses	\$	
Disabled D FT	Student 🗆	SSN or ITIN		1				G	iross Income	\$	
Name				DOB				Child Ca	are Expenses	\$	
Disabled D FT	Student 🗆	SSN or ITIN	1					G	iross Income	\$	
4. REFUND INFORMATIO											
Complete if you would		nd deposite	d into you	r bank acco	ount						
Bank Name			-					Type:	Checking		Savings
Routing Number						Account I	Number				
Name on Account					Ac	count out	side of the	US jurisdi	ction?	□ Yes	□ No
5. HEALTH CARE INFOR	MATION										
Please indictate where y	you received y	our health i	nsurance f	rom for all	members	of your ta	x househo	old.			
Employer		Governme	nt-sponsor	ed Market	place			Private Ex	change		
Form rec	eived in mail:		1095-A		1095-B		1095-C				
6. MISCELLANEOUS PER	SONAL INFOR	MATION O	UESTIONS				7. COMM	ENTS			
				Taxpayer	Spouse		<u></u>				
1. Were you a victim of	identity theft	and have yo	bu		D						
been contacted by t		-									
2. Were you a nonreside											
3. Have you received no	tice from the	IRS/State in	the								
last three years?	ana 10 an und	on (on otrado		_	_						
4. Do you have children under 24) who had	-	-									
5. If your child(ren) are i											
you elect to report div	•			<u> </u>							
6. Did you give a gift over											
7. If age 65 or older, do	you want to fi	le Form 104	10-								
SR for Seniors, instead o	of Form 1040?										

SALON P.2

		II	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	ime	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	ime	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 for			Yes 🗆	No 🗆			
3. Do you have a health savings account, Archer N	ASA, or Me	dicare	Yes 🗆	No 🗆			
Advantage? 4. Did you have a financial account ina foreign co	untry (ie h	hank					
account)?			Yes 🗆	No 🗆			
			Yes 🗆	No 🗆			
If yes, did the aggregate value of all financial accounts exceed \$10k at any time?							
5. Did you have any debt forgiven (i.e. student loa	Yes 🗆	No 🗆					
6. Did you receive (reward, award, etc.) or sell, exchange, gift or							
otherwise dispose of a digital asset or financial in	terest?		Yes 🗆	No 🗆			
8. COMMENTS							

MAS TAX ORGANIZER TAX YEAR 2023

SALON P.3

SALON	INCOME	AND EXP	PENSES
-------	--------	---------	--------

Product or Service Did you aquire this business during 2023? Yes No Business Address	Schedule C													
Accounting Method Cash Accrual Other Method used to value inventory Cost Lower of cost/mkt Other 1.INCOME	Owner of Business	🗆 Taxpayer	r □ Sp	ouse	🗆 Joint	Busin	ess Name							
Accounting Method Cash Accrual Other Method used to value inventory Cost Lower of cost/mkt Other 1. INCOME	Product or Servic	e					_	Did you	aquire th	is business	during 2023	3? Yes □	No 🗆	
LINCOME Z. VEHICLE INFORMATION Gross receipts or sales \$	Business Addres	ss					_	City, St	tate and Zi	p				
Gross receipts or sales s Make/Model: Returns and allowances s Date of Purchase: Other income (Mettohe comments) s Date of Purchase: Dispering of year s Date of Purchase: Cost of labor s Date of Purchase: Business Miles	Accounting Metho	d 🗆 Cash	□ Ac	crual	□ Other	Meth	od used to v	value in	ventory	□Cost	🗆 Lower	of cost/mkt	🗆 Other	
Automation S Date of Purchase: Other income (describe in commentu) S	1. INCOME						2. VEHICLE		MATION					
Other income (detactible in comments) S Business Miles Other	Gross receipts or sales	5	\$				Year:			Make/M	1odel:			
Inventory at beginning of year \$ Fuel, oil, repairs & maintenance \$ Parking fees & tolls \$ Other COG \$ Parking fees & tolls \$ Contract takor \$ Utilities \$ Contract takor \$ <th colspan<="" td=""><td>Returns and allowance</td><td>es</td><td>\$</td><td></td><td></td><td></td><td>Purchase P</td><td>Price</td><td>\$</td><td></td><td>Date of P</td><td>urchase:</td><td></td></th>	<td>Returns and allowance</td> <td>es</td> <td>\$</td> <td></td> <td></td> <td></td> <td>Purchase P</td> <td>Price</td> <td>\$</td> <td></td> <td>Date of P</td> <td>urchase:</td> <td></td>	Returns and allowance	es	\$				Purchase P	Price	\$		Date of P	urchase:	
Inventory at beginning of year s	Other income (describe in	comments)	\$				Business N	Ailes			Oth	er		
Materials and supplies COG s Other COG s Inventory at end of year s 3. EXPENSES Advertising \$ 3. EXPENSES Commissions & Fees \$ S Supplies "see below seed on the seed on th	Inventory at beginning	g of year	\$				Fuel, oil, re	epairs &	maintena	ince				
Other COG s Inventory at end of year s 3. EXPENSES Advertising \$ Science \$ Commissions & Fees \$ Science \$ Contract Labor \$ S Training/Educat. \$ Pension & Prof. Sh. \$ Rental - Tools, etc. \$ Contract Labor \$ S Training/Educat. \$ Popletion \$ S Travel \$ Montgage Interest \$ Employee Benefits \$ S Uniforms \$ Bank Fees \$ S Office Expenses \$ Office Expenses \$ Other \$ Legal and Prof. fees \$ S Taxes & Licenses \$ Invended Purchase Price Astes Purchased Date Purchase Price Assets Sold/Disposed of I \$ I \$ I \$ I \$ I \$ I \$ I	Cost of labor		\$				Parking fee	es & tol	ls		\$			
Inventory at end of year s S. EXPENSES Advertising \$ Pension & Prof. Sh. \$ Rental - Tools, etc. \$ Commissions & Fees \$ Supplies "see below \$ Utilities \$ Contract Labor \$ Training/Educat. \$ Rent - Shop/Office \$ Depletion \$ Travel \$ Mortgage Interest \$ Employee Benefits \$ Meals & Ent. \$ Repairs & Maint. \$ Employee Wages \$ Uniforms \$ Business Insurance \$ Bank Fees \$ Office Expenses \$ Other \$ Legal and Prof. fees \$ Taxes & Licenses \$ Other \$ Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ // \$ // \$ / / \$ // \$ // \$ / / \$ // \$ // \$ Scissors Foils Dip Poweders UV Lamps Main cure Bowls Scissors Foils Dip Poweders UV Lamps Main cure Bowls Scissors Foils Dip Poweders UV Lamps Main Polish Racks Shampoo Towels </td <td>Materials and supplies</td> <td>s COG</td> <td>\$</td> <td></td>	Materials and supplies	s COG	\$											
S. EXPENSES Advertising \$ Pension & Prof. Sh. \$ Rental - Tools, etc. \$ Commissions & Fees \$ Supplies "see below \$ Utilities \$ Contract Labor \$ Training/Educat. \$ Rental - Tools, etc. \$ Depletion \$ Travel \$ Rent - Shop/Office \$ Depletion \$ Meals & Ent. \$ Repairs & Maint. \$ Employee Benefits \$ Uniforms \$ Business Insurance \$ Bank Fees \$ Office Expenses \$ Other \$ Legal and Prof. fees \$ Taxes & Licenses \$ Other \$ Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ Edgal and Prof. fees \$ Taxes & Licenses \$ Other \$ Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / \$ / \$ / <td>Other COG</td> <td></td> <td>\$</td> <td></td>	Other COG		\$											
Advertising S Pension & Prof. Sh. S Rental - Tools, etc. S Commissions & Fees Supplies "see below S Utilities S Contract Labor S Training/Educat. S Rent - Shop/Office S Depletion S Training/Educat. S Repairs & Maint. S Employee Benefits S Uniforms S Business Insurance S Bank Fees S Office Expenses S Other S Legal and Prof. fees S Taxes & Licenses S Other S Assets Purchases Date Purchase Price / / / / S / / / / S / / S / / S / / S / / S / / S	Inventory at end of ye	ar	\$											
Commissions & Fees S Supplies "see below S Utilities S Contract Labor \$ Training/Educat. \$ Rent - Shop/Office S Depletion \$ Training/Educat. \$ Mortgage Interest \$ Employee Benefits \$ Meals & Ent. \$ Repairs & Maint. \$ Employee Wages \$ Uniforms \$ Business Insurance \$ Bank Fees \$ Office Expenses \$ Other \$ \$ Legal and Prof. fees \$ Taxes & Licenses \$ Other \$ \$ Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / \$ / \$ / / \$ / \$ / \$ / / \$ / \$ / \$ Legal and Prof. fees \$ Taxes & Licenses \$ Other \$ Purchase Price Assets Purchased Date Purchase Price / \$ / \$ </td <td>3. EXPENSES</td> <td></td>	3. EXPENSES													
Contract Labor \$ Training/Educat. \$ Rent - Shop/Office \$ Depletion \$ Travel \$ Mortgage Interest \$ \$ Mortgage Interest \$ \$ Employee Benefits \$ Uniforms \$ Repairs & Maint. \$ \$ \$ \$ Employee Wages \$ Uniforms \$ Business Insurance \$ \$	Advertising	\$			Pension	& Prof. Sh.	\$			Rent	al - Tools, et	c. \$		
Contract Labor \$ Training/Educat. \$ Rent - Shop/Office \$ Depletion \$ Travel \$ Mortgage Interest \$ Employee Benefits \$ Meals & Ent. \$ Repairs & Maint. \$ Employee Wages \$ Uniforms \$ Business Insurance \$ Bank Fees \$ Office Expenses \$ Other \$ Legal and Prof. fees \$ Taxes & Licenses \$ Vertice \$ Assets PurchAsses & DISPOSITION OF ASSETS IN 2023 Assets Sold/Disposed of Date Purchase Price / / \$ Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ // / \$ \$ / / \$ // / \$ \$ / / \$ // / \$ \$ / / \$ // / \$ \$ / / \$ // / \$ \$ / / \$ // / \$ \$ // / \$ //	Commissions & Fees	\$			Supplie	es *see below	\$				Utilitie	es \$		
Depletion s Travel s Mortgage Interest s Employee Benefits s Meals & Ent. s Repairs & Maint. s Employee Wages s Uniforms s Business Insurance s Bank Fees s Office Expenses s Other s Legal and Prof. fees s Taxes & Licenses s Other s Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / s // s // s // / s // // s // s // / s // // s // s // s // // s // // s // s // s // s // s // s /	Contract Labor				Trainin	g/Educat.	\$			Rent	- Shop/Offic	ce \$		
Employee Benefits § Meals & Ent. § Repairs & Maint. § Employee Wages § Uniforms § Business Insurance § Bank Fees § Office Expenses § Other § Legal and Prof. fees \$ Taxes & Licenses \$ Other § 4. SALES, PURCHASES & DISPOSITION OF ASSETS IN 2023 Assets Sold/Disposed of Date Purchase Price Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ / / \$ ////\$ \$ ////\$ \$ //// \$ ////\$ ////\$ \$	Depletion	\$			-	Travel	<u>,</u>				tgage Intere	st \$		
Employee Wages § Uniforms § Business Insurance § Bank Fees § Office Expenses § Other § Legal and Prof. fees \$ Taxes & Licenses \$ Other § 4. SALES, PURCHASES & DISPOSITION OF ASSETS IN 2023 Assets Sold/Disposed of Date Purchase Price Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ // / \$ // / \$ / / / \$ // / \$ // \$ // \$ / / / \$ // / \$ //<	Employee Benefits				Me	als & Ent.				Rej	oairs & Main	it. \$		
Bank Fees S Office Expenses S Other S Legal and Prof. fees \$ Taxes & Licenses \$ Other S 4. SALES, PURCHASES & DISPOSITION OF ASSETS IN 2023 Assets Sold/Disposed of Date Purchase Price Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ // / \$ // / \$ / / \$ // / \$ // / \$ // / \$ // / \$ // / \$ // / \$ // / \$ // \$ \$ // / \$ // / \$ // \$ \$ // / \$ // / \$ // \$ \$ // / \$ // / \$ \$ \$ \$ // / \$ Y \$ \$ \$ \$	Employee Wages									Busir	iess Insurand	ce \$		
A. SALES, PURCHASES & DISPOSITION OF ASSETS IN 2023 Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / / \$ // / \$ / / \$ // / \$ // / \$ / / \$ // / \$ // / \$ / / \$ // / \$ // / \$ / / \$ // / \$ // / \$ / / \$ // / \$ // \$ \$ / / \$ // / \$ // \$ \$ // / \$ // / \$ // \$ \$ // / \$ // / \$ \$ // \$ // / \$ \$ // \$ \$ // \$	Bank Fees	\$			Office						Oth	er \$		
Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / / \$ / / \$ / / \$ / / \$ // \$ // \$ / / \$ // \$ // \$ // \$ / / \$ // \$ // \$ // \$ / / \$ // / \$ // \$ // \$ // / \$ // // \$ // \$ \$ // / \$ // // \$ // \$ \$ // / \$ // // \$ // \$ \$ Scissors Foils Dip Poweders UV Lamps Nail Polish Racks \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Legal and Prof. fees	\$			Taxes 8	& Licenses	\$							
Assets Purchased Date Purchase Price Assets Sold/Disposed of Date Purchase Price / / \$ / / \$ / / \$ / / \$ / / \$ // \$ // \$ / / \$ // \$ // \$ // \$ / / \$ // \$ // \$ // \$ / / \$ // / \$ // \$ // \$ // / \$ // // \$ // \$ \$ // / \$ // // \$ // \$ \$ // / \$ // // \$ // \$ \$ Scissors Foils Dip Poweders UV Lamps Nail Polish Racks \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	4. SALES, PURCHASES	& DISPOSITIO	ON OF A	SSETS	IN 2023									
/ /	Assets Purchased		Da	ite	Purchas	e Price	Assets S	Sold/Dis	sposed of		Date	Purcha	se Price	
/ / \$ / \$ / / \$ / \$ / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ Scissors Foils Dip Poweders UV Lamps Nail Polish Racks Manicure Bowls Nail Polish Cotton Pads Skin Care Products Carts and Trolleys Smocks Drills C			/	/	\$						/ /	\$		
/ / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ / / \$ Scissors Foils Dip Poweders UV Lamps Shampoo Towels Nail Decals Files Blow dryers Nail Polish Cotton Pads Skin Care Products Smocks Drills			/	/	\$						/ /	\$		
/ / \$ / / \$ / / \$ / / \$ / / \$ / / \$ *EXAMPLES_OF SALON SUPPLY DEDUCTIONS Scissors Foils Dip Poweders UV Lamps Nail Polish Racks Shampoo Towels Nail Decals Files Blow dryers Nail Polish Cotton Pads Skin Care Products Smocks Drills Cuticle Pushers Styling Products Sterilizer Boxes			/	/	\$						/ /	\$		
*EXAMPLES OF SALON SUPPLY DEDUCTIONSScissorsFoilsDip PowedersUV LampsNail Polish RacksShampooTowelsNail DecalsFilesManicure BowlsBlow dryersNail PolishCotton PadsSkin Care ProductsCarts and TrolleysSmocksDrillsCuticle PushersStyling ProductsSterilizer Boxes			/	/	\$						/ /	\$		
ScissorsFoilsDip PowedersUV LampsNail Polish RacksShampooTowelsNail DecalsFilesManicure BowlsBlow dryersNail PolishCotton PadsSkin Care ProductsCarts and TrolleysSmocksDrillsCuticle PushersStyling ProductsSterilizer Boxes			/	/	\$							\$		
ShampooTowelsNail DecalsFilesManicure BowlsBlow dryersNail PolishCotton PadsSkin Care ProductsCarts and TrolleysSmocksDrillsCuticle PushersStyling ProductsSterilizer Boxes					*EXAMPL	<u>ES</u> OF SAL	ON SUPPLY	DEDU	<u>CTIONS</u>					
Blow dryersNail PolishCotton PadsSkin Care ProductsCarts and TrolleysSmocksDrillsCuticle PushersStyling ProductsSterilizer Boxes	Scissors				•				ps					
Smocks Drills Cuticle Pushers Styling Products Sterilizer Boxes	Shampoo Blow dryors									_				
	-									0		-		
Mirrors Brusnes Nail Clippers Laundry Detergent PPE & Sanitizer	Mirrors	Brushes			Nail Clippe				Detergent	ŀ	PPE & Sar			

DEDUCTIONS

SALON P.4

1. EDUCATION											
Attach 1098-Ts, 1098-E	s and 1099-Qs										
Student 1 Name				Educatio	nal Ins	t.:					
Tuition & fees	Loan Interes	t Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$		\$		_ □						
Student 2 Name				Educatio	nal Ins	t.:					
Tuition & fees	Loan Interes	st Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$		\$								
Student 3 Name				Educatio	nal Ins	t.:					
Tuition & fees	Loan Interes	t Paid	Supplies & Books		FR	SO	JR	SR	Other	529 Plan	
\$	\$		\$								
2. JOB-RELATED MOV	VING EXPENSES	<u>)</u>					3. IF	ra con'	TRIBUTIC	<u>NS</u>	
Lodging <u>\$</u>		_	Miles from old home to new	work			Cont	ribution	s to	Ś	
Fuel <u>\$</u>		_	Miles from old home to old	work			tradi	itional IR	A	Ÿ	
Mileage \$			Member of Armed For	ces? 🗆 Yes		No	Cont	ribution	s to	Ś	
Other \$							ROT	H or IRA		<u>ې</u>	
4. OTHER DEDUCTIO	<u>NS</u>										
Educator Expenses		\$		Alimony	Paid			\$			
Health Savings Accou	int Contr.	\$		Date of	^c divor	rce/se	р.			1	1
Archer Medical Savin	gs Contr.	\$		Qualified	d busi	ness r	et	\$			
Jury duty repymt to e	employer	\$		loss carr	yover	from	2022	2			
Foreign qualified hou	ising exp.	\$		Qualified	d REIT	divid	ends	\$			
Contr. To 529 College	e Plan	\$		& PTP ne	et loss	s carry	over	from 2	022		
5. MISCELLANEOUS	DEDUCTION QU	ESTION	<u>5</u>								
1. Did you purchase a	an item(s) in 202	23 in whi	ch you paid a large sales tax?					Yes	□ No		
2. Did you purchase (NOT lease) an e	lectric o	r plug-in hybrid vehicle during	2023?				Yes	□ No		
a. Did you receive	e the EV tax cree	dit as an	instant discout at the dealersh	ip?				Yes	□ No		
b. Please list the y	year, make and	model:									
3. Did you refinance a	a mortgage duri	ng 2023	?					Yes	□ No		
6. COMMENTS											

SALON P.5

				CREDITS AND P	AYMENTS						
1. CHILD CARE CREDIT											
Attach Daycare Provider S	Statemer	nt(s)									
Provider Name				Address	Phone						
ID #			Amo	unt Paid \$	Tax Exempt? 🛛 Yes	□No					
Provider Name				Address	Phone						
ID #			Amo	unt Paid \$	Tax Exempt?						
Provider Name			Anto	Address	Phone						
				Audress	Filone						
ID #			Amo	unt Paid \$	Tax Exempt? 🛛 Yes 🛛	□No					
2. RESIDENTIAL ENERG	GY CRED	IT									
Solar electric property	\$				Metal or ashphalt roof <u>\$</u>						
Solar water heating	\$				Exterior windows and skylights <u>\$</u>						
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 <u>\$</u>						
Insulation material	\$				Natrual gas, propane or oil furnace <u>\$</u>						
Exterior doors	\$				Advanced main air circulating fan <u>\$</u>						
1. Were the qualified ir	nprover	ments for yo	ur main hon	ne in the United States	s? □ Yes □ No						
2. Were any improvem	ents rela	ated to the c	onstruction	of this main home?	🗆 Yes 🗆 No						
3. ESTIMATED TAX PA	YMENTS				4. MISCELLANEOUS CREDIT QUESTIONS						
FEDERAL (Applied from 2	2022 fed	eral refund)			1. Did you pay expenses related to the Yes 🗆 N	o 🗆					
	Date	Paid		Amount Paid	adoption of an eligible child?						
1st QTR	/	/	\$			o 🗆					
2nd QTR	/	/	\$		time Homebuyer Credit?						
3rd QTR	/	/	\$		Si bo you have a social security humber	o 🗆					
4th QTR	/	/	\$		that is valid & allows you to work?	_					
STATE (Applied from 202	2 state r Date	•		Amount Paid	 Were you issued a Mortgage Credit Yes □ N Certificate (MCC)? 	o 🗆					
1st QTR	Jale /	/	\$	Amount Palu							
2nd QTR	/	/	\$		5. COMMENTS						
3rd QTR	/	/	\$								
4th QTR	/	/	\$								
State Name											
LOCAL (Applied from 202	22 local r Date			Amount Paid							
1st QTR	/	/	\$								
2nd QTR	/	/	\$								
3rd QTR	/	/	\$								
4th QTR	/	/	\$								
Locality Name											

CHARITABLE CONTRIBUTIONS

1. CHARITABLE CONTRIBUTIONS TOTALING OVER \$250 FOR 2023 ONLY COMPLETE IF YOU DONATED MORE THAN \$250 FOR THE YEAR; OTHERWISE THE STANDARD DEDUCTION WILL APPLY Attach receipts of contributions totaling over \$250 for 2023 Тах **Organization Name** Exempt Date of contr. **Amount Paid** \$ / / \$ \$ \$ Ś Ś \$ \$ П \$ \$ 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
- □ 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