

Dear :

This Tax Organizer is designed to help you gather the tax information needed to prepare your **2023 PERSONAL INCOME TAX RETURN**. To help you complete the Organizer you will find certain information from your 2022 personal income tax return. To protect your privacy, your Tax Organizer contains masked data displayed as asterisks (e.g. Social Security number could display as ***-**-6789). If you would like to confirm the masked data or make a change to your data, please contact this office.

It is VERY IMPORTANT that we have your current personal e-mail address (both emails for joint returns) in order for us to effectively communicate with our clients. Notices about important tax changes, reminders and filing confirmations are emailed. Emails will not contain any personal identifying information. **E-Signature for completed tax returns is available for clients with active portals and complete email information (joint returns require two unique emails)**. If you do not have a Client Portal, please call our office so we can set you up with one.

Also, we ask that you please have all your material to us, even if you haven't received your K-1 forms, by March 15th. Tax packets received AFTER Friday, March 15th will be put on Extension. An extension to file the tax return is NOT an extension to pay taxes due. We require some information in order to calculate any tax liability due with your extension so contact your staff accountant asap to discuss.

Enter 2023 information on the Tax Organizer pages provided. If any information does not apply to you or is incorrect, please draw a line through it or make the necessary corrections.

Important: the Client Questionnaire asks about pertinent tax items necessary for preparing the most accurate tax return possible. **Please answer all applicable questions** and attach a statement when necessary. Use the Notes to Preparer Page to enter additional information not provided in the Tax Organizer and to ask any questions that you may have for our office.

You also will need to provide the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, virtual currencies, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Six-digit Identity Protection PIN if sent to you by the IRS.
- Any tax notices sent to you by the IRS or other taxing authority.

The IRS doesn't *initiate* contact with taxpayers by email, phone, text messages or social media channels to request personal or financial information. This includes requests for PIN numbers, passwords or similar access information for credit cards, banks or other financial accounts. Phishing is a scam typically carried out through unsolicited email and/or websites that pose as

legitimate sites and lure unsuspecting victims to provide personal and financial information. If you receive such an email from the IRS, forward the email as-is to phishing@irs.gov. Please do not respond to the email unless the email request you send to the IRS has been verified as legitimate. You may also contact our office regarding any correspondence, written or electronic, that you receive from the IRS. Additional information can be found at: <https://www.irs.gov/privacy-disclosure/report-phishing>.

In order to meet the filing deadline for your 2023 income tax return, your completed tax organizer needs to be received by our office no later than March 15, 2024. Any information received after that date may require an extension of time be filed for your return.

Thank you for the opportunity to serve you.

Sincerely,
Your dedicated Partners and Staff