

Howland Tax Services *International*

2023 Personal Tax Organizer (United States)



Personal Information

You	Your Spouse
Name (including initial)	Name (including initial)
SSN or ITIN	SSN or ITIN
Date of Birth	Date of Birth
Preferred Filing Status... <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Qualifying Surviving Spouse
Address	Address (if different)
Zip Code	Zip Code
Phone	Phone
Email	Email
Occupation	Occupation
Filing Category (You): <input type="checkbox"/> United States Citizen <input type="checkbox"/> Green Card Holder, or Resident Alien <input type="checkbox"/> Non-Resident Alien <input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)	Filing Category (Your Spouse): <input type="checkbox"/> United States Citizen <input type="checkbox"/> Green Card Holder or Resident Alien <input type="checkbox"/> Non-Resident Alien <input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)

State of residence on Dec. 31, 2023 (if applicable): _____

Bona fide resident of Puerto Rico, Guam, Virgin Islands, or Northern Mariana Islands? Yes No

United States Visa type and date issued (if applicable): _____

Canadian Visa type and date issued (if applicable): _____

Non-Resident Aliens: days present in U.S. during... 2023: _____ 2022: _____ 2021: _____

Your Dependants	1	2	3
Name			
Date of Birth			
Relationship			
SSN or ITIN			
Income (Type and Amount)			
Months Lived With You			
U.S. Citizen/Resident Alien?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

General Background

Did your marital status change during the year? Yes No

If yes, indicate change and date of change:

Did you live apart from your spouse for the entire year? Yes No

Does your spouse itemize deductions on a separate return? Yes No

Can you be claimed as a dependent on another person's tax return? Yes No

Do you want \$3 to go into the Presidential Election Campaign Fund? Yes No

Were you or your spouse enrolled as a full-time student during 2023? Yes No

Did you pay any educational tuition or fees for yourself or a dependent? Yes No

Were you or your spouse permanently disabled at any time during 2023? Yes No

Were you or your spouse legally blind at any time during 2023? Yes No

Did you pay childcare expenses? Yes No

If yes, provide names, addresses and tax ID numbers (SSN or EIN) of childcare providers, and receipts.

Did you (or your spouse if filing jointly) receive any advance child tax credit payments? Yes No

Did you engage in a transaction involving a digital asset (i.e. virtual currency) during 2023? Yes No

Do you want to show your email address on your return filed with the IRS? Yes No

Health Insurance

Did you purchase health insurance through a government-sponsored Marketplace in 2023? Yes No

Please provide copies of Form 1095-A, 1095-B, or 1095-C if received.

Documents Needed to Prepare your Return(s)

- New clients: complete copies of the last tax returns filed
- Copies of income tax forms received, including W-2, 1042-S, 1095-A, 1095-B, 1095-C, 1098, 1098-C, 1098-T, 1099-B, 1099-C, 1099-DIV, 1099-G, 1099-INT, 1099-K, 1099-MISC, 1099-OID, 1099-Q, 1099-QA, 1099-R, 1099-SA, RRB-1099-R, SSA-1099, SSA-1042-S, Schedule K-1, etc.
- Clean vehicle credit: did you purchase a new or used plug-in electric motor vehicle during 2023?.
- Indicate income from alimony, gambling winnings, prizes or awards, scholarships or fellowships, jury duty, etc.
- Eligible educators: qualified expenses paid (i.e. classroom materials, professional development courses)
- Homeowners: statements showing mortgage interest and qualified mortgage insurance payments (i.e. Form 1098), sale of home or other property (i.e. Form 1099-S), real estate taxes paid
- Receipts for rent paid, if your state return permits a rental tax credit and you qualify
- Receipts for moving expenses, if you are a member of the Armed Forces on active duty, and due to a military order you move because of a permanent change of station
- Documentation of cash gifts, if you gave more than \$17,000 to any one person during the year
- Receipts for student loan interest paid
- Documentation of qualified educational expenses (i.e. Form 1098-T)
- Receipts for auto personal property tax paid
- Charitable donations: provide bank record, cancelled check or receipt for all amounts
- Investment interest expense receipts
- Childcare expense receipts
- Alimony paid: provide documentation
- Receipts for medical/dental expenses and reimbursements from health coverage plans
- Casualty/theft losses: provide documentation
- Estimated tax payments made for 2023: provide documentation
- IRS or State correspondence and assessment notices, if received
- Receipts or documentation of retirement plan contributions
- Income and expenses from rental properties or businesses
- Foreign Tax Credit: if you paid tax to a foreign country for income earned outside the United States, provide details and a copy of the foreign tax return
- Please indicate any other income or expense amounts:

Refunds

If you receive a refund on your 2023 income tax return, do you want to apply that refund to your 2024 tax?

Yes No

Do you want your refund to be direct deposited into your bank accounts?

Yes No

If yes, provide information for up to three accounts (banks must be located in the U.S.):

Bank Routings: _____

Account Numbers: _____

Do you want to use a portion of your refund to buy Series I U.S. Savings Bonds?

Yes No

If yes, please indicate preferred amount invested in bonds (must be divisible by 50 and no more than \$5,000), and indicate bank routing and account number for deposit of remaining refund:

Foreign Accounts and Investments

Did you have more than \$10,000 in foreign (non-U.S.) bank or financial accounts at any time during 2023

(including Canadian RRSPs, RRIFs, RESPs, or TFSAs)?

Yes No

If yes, FinCEN Report 114 *Report of Foreign Bank and Financial Accounts* should be filed by April 15 using the BSA E-Filing system. If you would like us to complete and file the form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account during 2023:

Note that, if you can't make the April 15 deadline above, you are allowed an automatic extension to October 15. You don't need to request it to take advantage of this later filing date, but you should enter the reason for the late filing on your FBAR.

If you had foreign (non-U.S.) financial assets in 2023, you may also be required to file Form 8938 *Statement of Specified Foreign Financial Assets* or Form 8621 *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund* with your income tax return(s).