

STOP

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- 1) Download to your computer.
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- 3) Open from the saved location, and then begin to work.

Other helpful information

- Did you know the notes app on iPhone can scan documents into PDF? We highly prefer PDF format. Images clog the portal and are difficult to organize. Open the notes app, click new note, then click the camera button to scan to PDF.

Secure file Portal

- Please never send us sensitive information via email. We use Citrix ShareFile as our secure file sharing software. You can find a link to it on our website www.cpabroomfield.com or by clicking here. [Secure File Portal](#)

Joint returns must include two unique email addresses which will be used for digital signature.

TAX ORGANIZER

Taxpayer Information				Spouse Information			
Last name				Last name.....			
First name				First name			
Middle Initial.....		Suffix.....		Middle Initial.....		Suffix	
Social security number				Social security number			
Occupation				Occupation.....			
Work phone		Ext ...		Work phone.....		Ext ...	
Cell phone				Cell phone			
E-mail address.....				E-mail address			
Date of birth.....				Date of birth			
Address						Apartment number.....	
City				State.....		ZIP Code.....	
Home phone.....		Fax number					

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid
student loan interest.....

Joint returns must include two unique email addresses which will be used for digital signature.

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name	Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____
Medicare C premiums withheld	_____	_____
Medicare D premiums withheld	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

ATTACH SCHEDULE C ORGANIZER

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made	_____	_____
Roth IRA contributions made	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

Do not enter 401(k) contributions through an employer plan here, SEP, and Individual 401(k) are for self employed individuals only.

Medical and Dental Expenses	Amount
Prescription medications.....	_____
Health insurance premiums	_____
Doctors, dentists, etc	_____
Hospitals, clinics, etc	_____
Eyeglasses and contact lenses	_____
Miles driven for medical purposes...	_____
Other medical and dental expenses: _____	_____
<hr/>	
Taxes	Amount
Real estate taxes paid on principal residence	_____
Real estate taxes paid on additional homes or land	_____
Auto license registration fees based on the value of the vehicle	_____
Other personal property taxes	_____
<hr/>	
Interest Expenses	Amount
Home mortgage interest paid – Attach Form(s) 1098.	
Lender's Name _____	_____
Points paid on loan to buy, build or improve main home	_____
Lender's Name _____	_____
<hr/>	
Cash/Check/Credit Contributions	Amount
_____	_____
_____	_____
_____	_____
<hr/>	
Noncash Charitable Contributions	Amount
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.	
_____	_____
<hr/>	
Miscellaneous Deductions	Amount
Union and professional dues	_____
Professional subscriptions, books, supplies	_____
Uniforms and protective clothing (including cleaning)	_____
Job search costs	_____
Taxpayer educator expenses.....	_____
Spouse educator expenses.....	_____
Tax return preparation fees	_____
Safe deposit box rental	_____
Gambling losses (to the extent of gambling income)	_____
Other expenses (list): _____	_____

	Yes	No
1 Did a lender cancel any of your debt in 2023? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023? If yes , please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2023? If yes , enter year, make, model, and date purchased: Please send VIN, proof of purchase, and proof of registration in Colorado _____	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2023? If yes , attach Form 1098C.....	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2023 ? % State ID		
7 Did your marital status change during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain: _____		
8 Were you or your spouse permanently and totally disabled in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file?.....	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500?...	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2023?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?.....	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
16 a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023 ? If yes , attach closing or escrow statements, 1099-C or 1099-A forms.....	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?.....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any casualty or theft losses during 2023?.....	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts?.....	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2023 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you buy or sell any stocks or bonds in 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?..	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you incur any moving expenses? If yes , attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you receive any income not included in this Tax Organizer?.....	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
24 Do you expect your income and deductions in 2024 to be the same as 2023 ?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
25 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
26 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>
27 a Did you obtain a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, has any portion of that loan been forgiven?	<input type="checkbox"/>	<input type="checkbox"/>
28 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
29 Enter your state of residence..... Taxpayer _____ Spouse _____		
30 a Do you want to change the language with which the IRS communicates with you?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language?.....		

	Yes	No
Electronic Filing and Direct Deposit of Refund		
If your tax return is eligible for Electronic Filing, would you like to file electronically?.....	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?.....	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

HEALTH INSURANCE REPORTING REQUIREMENTS

Did you purchase health insurance through a government marketplace exchange?

YES NO

If yes, please include a full copy of form 1095-A. It will look like the image below.

If you purchased insurance through a private plan or your workplace you would receive form 1095-B or 1095-C. We do not need to report B or C for Colorado residents. We only need form 1095-A.

Form 1095-A	Health Insurance Marketplace Statement	<input type="checkbox"/> VOID	OMB No. 1545-2232
Department of the Treasury Internal Revenue Service	Do not attach to your tax return. Keep for your records. Go to www.irs.gov/Form1095A for instructions and the latest information.	<input type="checkbox"/> CORRECTED	2023
Part I Recipient Information			
1 Marketplace identifier	2 Marketplace-assigned policy number	3 Policy issuer's name	
4 Recipient's name	5 Recipient's SSN	6 Recipient's date of birth	
7 Recipient's spouse's name	8 Recipient's spouse's SSN	9 Recipient's spouse's date of birth	
10 Policy start date	11 Policy termination date	12 Street address (including apartment no.)	
13 City or town	14 State or province	15 Country and ZIP or foreign postal code	

OTHER REMINDERS

- Did you know that you can use the notes app on iPhone to scan documents into PDF? We highly prefer documents in PDF format as pictures clog the portal and are difficult to organize. Open the notes app, click new note, then click the camera button to scan to PDF.
- If you checked yes for direct deposit of refund. Please send us the bank and routing numbers.