

[Your Company Logo]

Tax Organizer

“Organizing Your Financial Information for 2023 Taxes.”

Contact Information:

[Your Company Name]

[Your Address]

[Your Email]

[Your Phone Number]

Introduction

Dear [Client's Name],

Welcome to our Tax Organizer for the year 2023! This document is designed to assist you in gathering and organizing your tax-related information needed for the preparation of your tax return. Please provide accurate and complete information to ensure the accuracy of your tax return.

Please follow the instructions provided in each section and fill out the fields with the relevant information. If you have any questions or need clarification, feel free to contact us at [Your Contact Information].

Confidentiality Notice: All information provided within this document will be treated with the utmost confidentiality and will only be used for the preparation of your tax return.

Personal Information

1. Primary Taxpayer Information:

- Full Name: _____
- Date of Birth: //_____
- Social Security Number: *--_____
- Occupation: _____
- Email Address: _____
- Phone Number: (____) - _____

2. Spouse Information (If applicable):

- Full Name: _____
- Date of Birth: //_____
- Social Security Number: *--_____
- Occupation: _____
- Email Address: _____
- Phone Number: (____) - _____

3. Residential Address:

- Street Address: _____
- City: _____ State: _____ ZIP Code: _____

Dependent Information

1. Full Name: _____
2. Social Security Number: *-- _____
3. Relationship: _____
4. Date of Birth: // _____
5. Number of Months Living at Home: _____

Please add additional sheets if you have more dependents.

Income Information

1. Employment Income:

- Attach all W-2 forms for each job held by each household member.
- Details of any tip income: \$ _____

2. Business/Independent Contractor Income:

- Attach all 1099-NEC forms.
- Gross Receipts: \$ _____
- Total Business Expenses: \$ _____
- Home Office Expenses: \$ _____
- Vehicle Information & Mileage: _____

Please refer to the appendices for detailed instructions on filling out each section and for more information on other income sources and deductions.

Submit Completed Document To:

[Submission Instructions: e.g., Email to [Your Email Address] or upload to [Your Secure Portal Link] or drop off at [Your Office Address].]

Thank you for using our services. We look forward to assisting you with your tax preparation needs.

Sincerely,

[Your Company Name]

Privacy and Disclaimer Notice

This document is confidential and intended solely for the use of the individual or entity to whom it is addressed. Unauthorized distribution, modification, or disclosure of this document is strictly prohibited. Please ensure the accuracy and completeness of the information provided as it directly impacts the integrity of your tax return.