

## **INSTRUCTIONS FOR COMPLETING THE 2023 TAX ORGANIZER**

We are asking you to complete the attached 2023 Tax Organizer and return it to us in order to prepare your 2023 tax returns. The attached 2023 Tax Organizer is personalized for you and was prepared by us based on information used in preparing your 2022 tax returns. You will note that we have highlighted certain areas of the Tax Organizer that need to be completed based on last year's information. However, **you need to review and complete the entire Tax Organizer** as your circumstances and amounts may have changed in 2023.

Unfortunately, each year your tax return becomes more complex as the IRS requires additional information. If in 2023 you sold, sent, exchanged or otherwise acquired any financial interest in any Virtual Currency/Cryptocurrency, or had signatory authority over any Foreign Bank Accounts or owned other Foreign Financial Assets, you will need to complete the relevant Tax Organizer Supplements. You can download the relevant Tax Organizer Supplements from our website ([paulmarcianocpa.com](http://paulmarcianocpa.com)).

Please note the following instructions/guidance in completing the 2023 Tax Organizer:

1. Review the background information to insure it is accurate and up-to-date, especially your address, phone numbers and email address and/or other contact information or instructions.
2. When listing wages please report the information found in Box 1 of any W-2 statement you may have received. Attach a copy of the W-2 Statement to the Tax Organizer.
3. When reporting distributions from pensions, IRA's or 401(k) plans – report the gross distribution reported in Box 1 of any Form 1099-R you may have received. Attach a copy of the Form 1099-R to the Tax Organizer.
4. Report the gross amount of social security payments you may have received as reported in Box 5 of any Form 1099-SSA you may have received. Attach a copy of the 1099-SSA Statement to the Tax Organizer.
5. List all Form 1099's you receive and the amount of reported income. Attach a copy of each form 1099 you receive to the Tax Organizer.
6. Report all interest and dividends received as reported on 1099-INT or 1099-DIV you may have received. Attach a copy of each 1099-INT or 1099-Div you received to the Tax Organizer.
7. If you received unemployment compensation in 2023, you must report the compensation reported on any 1099-G you may have received.
8. List all of your charitable donations, both cash and non-cash property.
9. Answer questions **1-30** on page 4 of the Tax Organizer.
10. Answer all of the questions on the Additional 2023 Tax Organizer Information sheet.
11. If you were self-employed and/or had rental income property, you will need to complete the additional sections of the Tax Organizer relative to both. Attach a copy of any Form 1099 you received relative to any self-employment and/or rental income you received.
12. Complete any Tax Organizer Supplements that are applicable to you.

### **REMEMBER THE FOLLOWING:**

- **YOU NEED TO PROVIDE US WITH A COPY OF ALL APPLICABLE SOURCE DOCUMENTATION YOU RECEIVED (e.g., all IRS Tax Reporting Forms, W-2's, 1099's, evidence of health insurance, 1095A, MA1099-HC, real estate taxes, mortgage interest, unemployment compensation, etc.)**
- **YOU NEED TO INITIAL EACH PAGE OF THE TAX ORGANIZER AND SIGN EACH APPLICABLE SUPPLEMENT WHEN YOU RETURN THEM TO OUR OFFICE**
- **YOU NEED TO RETURN THE COMPLETED TAX ORGANIZER, ALL APPLICABLE TAX ORGANIZER SUPPLEMENTS, AND ALL RELEVANT SOURCE DOCUMENTATION BEFORE WE CAN TO PREPARE YOU TAX RETURNS.**