

- NOTES:** 1) You must retain receipts and backup for all tax items & expenses for at least 7 years.  
 2) Please upload, email or mail all docs at the same time, rather than piecemeal. Copies are preferred over originals.  
 3) Please do not send 5498 forms, 1095-B or C, receipts, annual statements or anything not specifically requested.  
 4) If you own a small business or rental property, please use the organizers found at [www.gmbookkeeping.com](http://www.gmbookkeeping.com)

**Taxpayer**

**Spouse**

Name			
SSN			
Occupation			
Date of Birth			
Email			
Phone #			
<b>FILING STATUS</b>	<b>MFS</b>	<b>MFJ</b>	<b>Single</b>
<b>Driver's License:</b> State, License #, Issue Date, Exp Date			

Name			
SSN			
Occupation			
Date of Birth			
Email			
Phone #			
<b>Driver's License:</b> State, License #, Issue Date, Exp Date			

If Married, Spouse info Req:

**Mailing Address (city, state, zip):**

**Direct Deposit Info:**

**Bank Name**  **Routing #**  **Account #**

If you want your refund split between bank accounts or used to purchase US Savings Bonds, please note below.

Dependents' Name	SSN	Date of Birth	Age 12/31/23

Do any dependents have earned income > \$12,950 or investment income > \$1,150? If so, a return may be required.

For Daycare and Summer/Sports Camps (under age 13)

\* Add list below if you need more space, must list amount paid per child

Child	Provider's Name	Provider's Address	Tax ID#	Amount Paid

For College & Grad Students:

\* Attach 1098-T, 1099-Q, and Savings Bond Info

Student	# of year's completed as of 12/31/23	Name of School	Tuition Paid in 2023	Other Exp Paid in 2023

Total Annual Contributions to State's 529 Plan

Any notes on items listed on this page?

NOTES:

**INCOME SOURCES - Please include copies of the following source documents:**

- W-2 Wages or W-2G Gambling Income, SSA-1099 (Social Security Statement)
- 1099-R (pension), 1099-MISC (miscellaneous), 1099-INT (interest), 1099-DIV (dividends), 1099-G (government payments)
- 1099-B: Stocks, Bonds, Real Estate - **must provide Purchase Price & Date, Sales Price & Date**
- Schedule K-1: Partnerships, S Corporations, Trust or Estate
- Other Income: Alimony, jury duty, tips, prizes, awards, unreported tips
- 1095-A from State Health Insurance Marketplace (1095-B and 1095-C are NOT needed)

**ESTIMATED TAX PAYMENTS - only list amounts you paid to the IRS and state on 2023 estimated tax vouchers**

- **do not include amounts paid towards prior year taxes**
- **do not include items paid or withheld through payroll, W-2, 1099 or other withholdings**

	Date	Amount	Date	Amount	Date	Amount	Date	Amount
Federal		\$ -		\$ -		\$ -		\$ -
State		\$ -		\$ -		\$ -		\$ -

**HEALTH SAVINGS ACCOUNTS**

- **do not include amounts listed on your W-2, only those made out of pocket**

	Taxpayer's Contribution	Spouse's Contribution
HSA Out of Pocket Contribution Amt	\$ -	\$ -
Was this a high deductible health plan?	yes / no	
Was this plan for an individual or family?	Individual / Family	

**RETIREMENT CONTRIBUTIONS**

- **do not include amounts listed on your W-2, only those made out of pocket**

	Taxpayer's Contribution	Spouse's Contribution	Date Made
Trad'l IRA Contributions ALREADY made for 2023	\$ -	\$ -	
Roth IRA Contributions ALREADY made for 2023	\$ -	\$ -	
SEP Contributions ALREADY made for 2023	\$ -	\$ -	

If you want GMB to calculate your allowable contributions, please make note below of how much you plan to contribute before 4/15/2024 (or just write "MAXIMIZE")

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**Student Loan Interest Deduction**

- **do not include interest statements from student loan companies**

Loan Company Name	Taxpayer's Interest Paid	Spouse's Interest Paid
	\$ -	\$ -
	\$ -	\$ -

Did you receive, sell, send, exchange or acquire any interest in any virtual currency?

yes / no
yes / no
yes / no
yes / no
yes / no

Do you have any foreign bank accounts that total \$10,000 or more?

If yes, did you complete the required FBAR disclosure forms to avoid IRS penalties?

Did you purchase an Electric or Hybrid Vehicle? Please provide copy of sales invoice & registration.

If taxpayer/spouse is a K-12 educator, did you spend \$300 or more on supplies?

Did you add heat pumps, boiler/furnace/fan, insulation, roof, water heater, or windows/doors to your home?

Cost	\$ -	Description	
Cost	\$ -	Description	
Amount of alimony paid?	\$ -	Recipient's SSN	
Amount of alimony received?	\$ -	Payor's SSN	
Date of Divorce			
Did you adopt a child?	yes / no	Total adoption expenses incurred?	\$ -

NOTES:	
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**ITEMIZED DEDUCTIONS**

Actuals only, estimates are not acceptable.

**MEDICAL EXPENSES: (only list if you feel they may exceed 7.5% of your income, or if you are self-employed)**

Prescription Drugs	\$ -
Doctors, Dentists	\$ -
Hospitals, Clinics	\$ -
Eyeglasses, Contacts	\$ -

LongTerm Care-taxpayer	\$ -
LongTerm Care-spouse	\$ -
Medical Eqpt & Supplies	\$ -

Insurance Premiums paid out of pocket

# Miles Driven for Medical

\$ - (do not include Medicare or premiums paid through an employer or paycheck)

**TAXES:**

Do you claim a home office for business? (If yes, complete page 2 of small business organizer)

yes / no

Real estate taxes paid on principal residence

\$ -

Real estate taxes paid on add'l homes or land (NOT RENTAL PROPERTIES)

\$ -

Car Registration Taxes

\$ -

Total sales tax paid on large purchases (if greater than state income tax paid)

\$ -

**HOME MORTGAGE INTEREST - Please include copies of Form 1098 for each loan:**

Mortgage Lender/Bank	Interest Paid
	\$ -
	\$ -
	\$ -

Points Paid on Mortgage

\$ -

Date Paid

Length of Mortgage

VT Residents: Do you claim Homestead?

yes / no

\*\*If yes, please provide tax bill

Total Rent Payments Made in 2023:

\* CHARITABLE CONTRIBUTIONS: Attach list if add'l space is needed. Please include whether you itemize or not.

CASH: Do not send receipts, but keep for your records

Name of Charity

\$ donated

	\$ -
	\$ -
	\$ -
	\$ -

Name of Charity

\$ donated

	\$ -
	\$ -
	\$ -

# Charitable Miles Driven?

**NON-CASH:**

Charity Name and Address

Est. Thrift  
Store Value

Est. Purch  
Price

Date Donated

	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	

NOTES: