

# 2023 TAX ORGANIZER

## ROBERT J. RIPP & ASSOCIATES

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YOUR NAME \_\_\_\_\_  
 SPOUSE'S NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 \_\_\_\_\_  
 COUNTY \_\_\_\_\_ SCHOOL DIST. \_\_\_\_\_  
 TELEPHONE NO. \_\_\_\_\_

DEPENDENTS			
NAME	DATE OF BIRTH	RELATIONSHIP	SOCIAL SECURITY NO.

DO YOU PAY COLLEGE TUITION FOR THE ABOVE?  
 AMOUNT \$ \_\_\_\_\_  
 YEAR IN SCHOOL \_\_\_\_\_

ARE ANY DEPENDENTS FILING A TAX RETURN?

\_\_\_\_\_

\_\_\_\_\_

YOUR DATE OF BIRTH \_\_\_\_\_ SPOUSE'S DATE OF BIRTH \_\_\_\_\_

DID YOU HAVE INCOME FROM INTEREST EARNED?

FROM WHOM:	AMOUNT
	\$ _____
	\$ _____
	\$ _____
	\$ _____

DID YOU HAVE INCOME FROM DIVIDENDS?

NAME OF CORPORATION PAYING DIVIDEND	AMOUNT
	\$ _____
	\$ _____
	\$ _____
	\$ _____
	\$ _____

TAX EXEMPT INTEREST

	\$ _____
	\$ _____
	\$ _____
	\$ _____

SOCIAL SECURITY

If you received any social security checks during the year, indicate total: \$ \_\_\_\_\_

MISCELLANEOUS DEDUCTIONS

Amount of ALIMONY paid by you \_\_\_\_\_ \$ \_\_\_\_\_  
 Social Sec. No. of Alimony Recipient \_\_\_\_\_  
 Date of Divorce decree \_\_\_\_\_

MEDICAL AND DENTAL EXPENSES

Drugs _____	\$ _____
Doctors _____	\$ _____
Dentists _____	\$ _____
_____	\$ _____
Glasses, Hearing Aids, Dentures, etc. _____	\$ _____
Hospitalization or Medical Insurance _____	\$ _____
Miles for Medical Travel _____	\$ _____

IRA ACCOUNTS

Did either of you convert an IRA Account to a Roth IRA - if yes, attach details Y  N

Did either of you roll over an employer plan into an IRA Y  N

IRA Contribution

Husband	Regular <input type="checkbox"/>	Roth <input type="checkbox"/>	\$ _____
Wife	Regular <input type="checkbox"/>	Roth <input type="checkbox"/>	\$ _____

CHILD CARE

If you maintain a household with a child under the age of 13, list any expense paid for household services and care of that child, in order for you to work. \_\_\_\_\_ \$ \_\_\_\_\_

Name of recipient \_\_\_\_\_  
 Address of recipient \_\_\_\_\_  
 \_\_\_\_\_  
 Social Security No. of recipient \_\_\_\_\_

TAXES

How much Property Tax did you pay? _____	\$ _____
Sales Tax Paid _____	\$ _____
City or State Income Tax Paid _____	\$ _____

INTEREST - FINANCE CARRYING CHARGES

TO WHOM PAID:	AMOUNT
_____ Home Mortgage	\$ _____
Home Mortgage Points _____	\$ _____
_____	\$ _____
Interest on Student Loans _____	\$ _____
Other Interest _____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

CONTRIBUTIONS

LIST ALL CONTRIBUTIONS - YOU MUST HAVE A CANCELLED CHECK OR WRITTEN RECORD FROM THE CHARITY FOR EACH ITEM LISTED.

_____ Church	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Fair Market Value of Materials Donated _____	\$ _____
Miles Driven for Charity _____	\$ _____

UNEMPLOYMENT COMPENSATION

If you received any unemployment compensation checks during the year, indicate total: \$ \_\_\_\_\_

**ESTIMATED TAX PAYMENTS**

FEDERAL Date Paid  
 1st Quarter - due 4/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 2nd Quarter - due 6/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 3rd Quarter - due 9/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 4th Quarter - due 1/15 (of next year) \_\_\_\_\_ \$ \_\_\_\_\_

STATE Date Paid  
 1st Quarter - due 4/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 2nd Quarter - due 6/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 3rd Quarter - due 9/15 \_\_\_\_\_ \$ \_\_\_\_\_  
 4th Quarter - due 1/15 (of next year) \_\_\_\_\_ \$ \_\_\_\_\_

**RENTAL PROPERTY**

	Properties					
	A		B		C	
<b>Income</b>						
Rents received.....						
<b>Expenses</b>						
Advertising.....						
Auto and travel .....						
Cleaning and maintenance.....						
Commissions.....						
Insurance.....						
Interest.....						
Legal and other professional fees .....						
Repairs .....						
Supplies.....						
Real Estate Tax .....						
Utilities .....						
Wages and Salaries.....						
Other (list).....						
.....						
.....						
.....						
.....						

**Sales of Stock**

Name and Number of Shares \_\_\_\_\_  
 Purchase Date \_\_\_\_\_  
 Purchase Price \$ \_\_\_\_\_  
 Sale Date \_\_\_\_\_  
 Selling Price \$ \_\_\_\_\_

**Affordable Care Act Compliance**

	<u>Y</u>	<u>N</u>
1. Did you obtain coverage through the Marketplace? (If yes, please provide Form 1095-A)	—	—
2. Did you have a financial interest in or signature authority over a financial account in a foreign country?	—	—
3. At any time during 2023, did you sell, exchange or otherwise dispose of, any financial interest in any virtual currency?	—	—
4. Did you incur college tuition expenses? (If yes, please provide Form 1098-T)	—	—
5. Did you make energy efficient improvements to your principal residence? (If yes, please provide details)	—	—