2023	1040	US	Client Information		1
	Patricia A Beckwith CPA 4630 Soquel Drive			Tax Return App	pointment
	Soquel Telepho Fax nur	CA 95073 one numbe	r: (831) 661-0665	Date: Time: Location:	
	This of y	tax organiz our 2023 ta	ter will assist you in gathering informa ax return. Please add, change, or dele	tion necessary for the	preparation opriate.
CLIEN	NT INFOR	MATION			
Filing Status	1=married	filing separate	and lived with spouse		
Taxpayer	First name Last name Title/suffix. Social secu Occupation Date of birl Date of dea	and initial  urity number  th (m/d/y)  ath (m/d/y)			Filing Status  1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying surviving spouse (QSS)
Spouse	Last name Title/suffix. Social secu Occupation Date of birl Date of dea	urity number			
	In care of.	ess			
Address	Apartment City	number			

2023	1040	US	Client Information (continued)		Page 2 1 p2
			Please add, change or delete information for 2023.		
CLIEI	NT INFO	RMATION	I		
Taxpayer Contact Information	Work phon Work exter Daytime pho Mobile pho Fax number	nesionone (table)ne		Daytim 1 = W 2 = H 3 = N	ome
Spouse Contact Information	Home phor Work phon Work exter Daytime ph Mobile pho Fax numbe	neeesionnone (table)ne			
Taxpayer outhentication	Driver's lice Driver's lice Issue date Expiration	ense no ense state (m/d/y) date (m/d/y) . ction PIN			
Spouse outhentication	Driver's lice Driver's lice Issue date Expiration	ense no ense state (m/d/y)			

2023 1040 US Dependents

## Please add, change or delete information for 2023.

## **DEPENDENTS**

	Dependent	Dependent	
First name			
Last name			Type of Dependent
Title/suffix			1 Obilet liste a settence
Date of birth (m/d/y)			1 = Child living w/taxpayer 2 = Child not living w/taxpayer
Date of death			3 = Dependent other than child
Date of adoption			4 = Head of household or qualifying surviving
Social security number			qualifying surviving spouse (QSS) only.
Relationship			not a dependent  5 = Earned income credit only,
Months lived at home			not a dependent
Type of dependent (see table)			
Earned income credit (see table)			Earned Income Credit
Claimed by: 1=taxpayer, 2=spouse			
IRS theft protection PIN			1 = When applicable (default) 2 = Student age 19 to 23
	Dependent	Dependent	3 = Disabled
First name			4 = Force 5 = Suppress
Last name			о о <b>ц</b> рргозз
Title/suffix			
Date of birth (m/d/y)			NOTE IS
Date of death			NOTE: If you claim the earned income credit, please provide
Date of adoption			proof that your child is a res-
Social security number			ident of the U.S. This proof is typically in the form of:
Relationship			School records or statement
Months lived at home			2. Landlord or property man-
Type of dependent (see table)			agement statement 3. Health care provider
Earned income credit (see table)			statement
Claimed by: 1=taxpayer, 2=spouse			4. Medical records
IRS theft protection PIN			<ul><li>5. Child care provider records</li><li>6. Placement agency statement</li></ul>
	Dependent	Dependent	7. Social service records or statement
First name			8. Place of worship statement
Last name			9. Indian tribe office statement 10. Employer statement
Title/suffix			10. Employer statement
Date of birth (m/d/y)			
Date of death			NOTE If your abild is allocated
Date of adoption			NOTE: If your child is disabled, please provide one of the fol-
Social security number			lowing forms of proof of disa-
			bility:
Relationship			
			Doctor statement     Other health care provider
Relationship			2. Other health care provider statement
Relationship			2. Other health care provider statement     3. Social services agency or
Relationship			2. Other health care provider statement

2

ORGANIZER Page 4 **Miscellaneous Questions** US 2023 1040 If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary. PERSONAL INFORMATION YES NO Did your marital status change during the year? Did your address change during the year? Could you be claimed as a dependent on another person's tax return for \${Y+00}? **DEPENDENTS** Were there any changes in dependents? Were any of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years or older if student) at the end of 2023? Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500? **HEALTH CARE COVERAGE** Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), If so, please attach. INCOME Did you receive unreported tip income of \$20 or more in any month? Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? Did you receive any disability income? Did you have any foreign income or pay any foreign taxes? PURCHASES, SALES AND DEBT Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? Did you buy or sell any stocks, bonds or other investment property in \${Y+00}? Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? Did you have any debts cancelled or forgiven? Does anyone owe you money which has become uncollectible?

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2023	1040	US	Miscellaneous Questions (continued)				
	If any	of the foll app	owing items pertain to you or your spouse for 2023, please check the ropriate box and provide additional information if necessary.				
YES	NO	RETIREMENT PLANS  Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?					
		Did you m	Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?				
		Did you transfer or rollover any amount from one retirement plan to another retirement plan?					
		-	eceive a distribution from an Education Savings Account or a Qualified Tuition Program?  your spouse, or a dependent incur any tuition expenses that are required to attend a college, university	/, or			
			ZED DEDUCTIONS nour a loss because of damaged or stolen property?				
		Did you w	ork out of town for part of the year?				
		Did you u	se your car on the job (other than to and from work)?				
		Did you a	IATED TAXES  pply an overpayment of 2022 taxes to your 2023 estimated tax (instead of being refunded)?  re an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead)	of beina			
		refunded)	? xpect your 2024 taxable income and withholdings to be different from 2023?	3			
		Do you wa	ELLANEOUS ant to allocate \$3 to the Presidential Election Campaign Fund? r spouse want to allocate \$3 to the Presidential Election Campaign Fund?				
		Š	RS discuss your tax return with your preparer?				
		Did you h	ave an interest in or signature or other authority over a financial account in a foreign country, such as securities account, or other financial account?	a bank			

ORGANIZER Page 6 **Miscellaneous Questions (continued)** US 2023 1040 If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary. MISCELLANEOUS (continued) YES NO Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? Was your home rented out or used for business? Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account? Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station? Did you engage the services of any household employees? Were you notified or audited by either the Internal Revenue Service or the State taxing agency? Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust? Did your bank account information change within the last twelve months? At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

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Direct Deposit & Estimates (Form 1040 ES) US 2023 1040 3, 6 Please enter all pertinent 2023 information. **DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)** 1=direct deposit of federal tax refund into bank account ...... **BANK INFORMATION** Percent to Type of Type of Deposit Account Invest. Name of Bank **Routing Number Account Number**  $(x\dot{x}.xx)$ (Table 1) (Table 2) 2023 ESTIMATED TAX / 1040-ES (6) 2023 **Federal Amount Paid Date Paid** Voucher Amount Overpayment applied from 2022 3rd quarter payment.. Additional Estimated Tax Payments Paid with extension..... Former spouse SSN if joint estimates 2023 State **Amount Paid Date Paid** Voucher Amount Overpayment applied from 2022 1st quarter payment 2nd quarter payment 3rd quarter payment 4th quarter payment Additional Estimated Tax Payments Paid with extension ..... 2 1 Type of Account Type of Investment 1 = Checking or savings (default) 2 = Taxpayer's IRA (next year limits) 3 = Spouse's IRA (next year limits) 4 = Health savings account (HSA) 5 = Archer MSA 6 = Coverdell savings account (ESA) 7 = Other 8 = Taxpayer's IRA (current year limits) 9 = Spouse's IRA (current year limits) 1 = Savings 2 = Checking

**ORGANIZER** Page 8 Direct Deposit & Estimates (Form 1040 ES) (cont.) US 1040 7.1 2023 Please enter all pertinent 2023 information. **APPLICATION OF 2023 OVERPAYMENT (7.1)** If you have an overpayment of 2023 taxes, do you want the excess refunded? or applied to 2024 estimate? Other (please explain): 2024 ESTIMATED TAX INFORMATION Do you expect your 2024 taxable income to be different from 2023? If "yes" explain any differences in income, deductions, dependents, etc.: Do you expect your 2024 withholding to be different from 2023? If "yes" explain any differences:

7.1