

## PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name .....	_____	_____
First name .....	_____	_____
Middle initial and suffix .....	MI ..... Suffix .....	MI ..... Suffix .....
Social security number .....	_____	_____
Occupation .....	_____	_____
Work phone/extension .....	_____	_____
Cell phone .....	_____	_____
E-mail address .....	_____	_____
Driver's License/Id issuing state .....	_____	_____
License /Id number .....	_____	_____
License/Id issue date .....	_____	_____
License/Id expiration date .....	_____	_____
Birthdate .....	MM/DD/YYYY .....	MM/DD/YYYY .....
Blind .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contribute to Presidential Election Campaign Fund .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Street address .....	_____	Apartment number .....
City .....	State .....	ZIP code .....
Home phone .....	Foreign country .....	_____
Fax .....	Foreign phone .....	_____

## FILING STATUS

☐ **1** Single  
☐ **2** Married filing jointly  
☐ **3** Married filing separately

Check this box if you **did not** live with spouse at any time during the year ..... ☐  
 Check this box if you are eligible to claim spouse's exemption ..... ☐  
 Check this box if your spouse itemizes deductions ..... ☐

☐ **4** Head of household  
 If the qualifying person is a child but not your dependent, enter  
 Child's name ..... Child's social security number .....

☐ **5** Qualifying surviving spouse  
 Check the box for the year the spouse died ..... 2021 ☐ 2022 ☐

## DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)				Social Security Number	**Code	Not qua- lified credit Other dep	Date of Birth	2023 Child Care Expense
				Relationship	+Months in U.S.		*Not Citizen	2022 Child Care Expense
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	

\*\* For the Dependent Code, enter the following:

L = dependent child who lived with you

N = dependent child who didn't live with you due to divorce or separation

O = other dependent

Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)

+ Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.

\* Check this box if dependent child is not a U.S. citizen or resident alien

## General Questions

ORG3

### PERSONAL INFORMATION

Yes No

- 1 Did your marital status change during 2023 ? ..... ☐ ☐  
 If **yes**, explain ..... \_\_\_\_\_
- 2 Do you want to allow your tax preparer to discuss this year's return with the IRS? ..... ☐ ☐  
 If **no**, enter another person (if desired) to be allowed to discuss this return with the IRS.  
**Caution:** Review any transferred information for accuracy.  
 Designee's Name ..... ▶ \_\_\_\_\_  
 Phone Number ..... ▶ \_\_\_\_\_ Personal Identification Number (5 digit PIN) ..... ▶ \_\_\_\_\_
- 3 Do you or your spouse plan to retire in 2024 ? ..... ☐ ☐
- 4 Were you or your spouse permanently and totally disabled in 2023 ? ..... ☐ ☐
- 5 Enter date of death for taxpayer or spouse (if during 2023 or 2024 ): Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_
- 6 Were you or your spouse a member of the U.S. Armed Forces during 2023 ? ..... ☐ ☐

### DEPENDENT INFORMATION

Yes No

- 7 a Do you have dependents who must file? ..... ☐ ☐  
 b If **yes**, do you want us to prepare the return(s)? ..... ☐ ☐
- 8 a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,500? ..... ☐ ☐  
 b If **yes**, do you want to include your child's income on your return? ..... ☐ ☐
- 9 Are any of your dependents **not** U.S. citizens or residents? ..... ☐ ☐
- 10 Did you provide over half the support for any other person during 2023 ? ..... ☐ ☐
- 11 Did you incur adoption expenses during 2023 ? ..... ☐ ☐

### IRA, PENSION AND EDUCATION SAVINGS PLANS

Yes No

- 12 Did you receive payments from a pension or profit-sharing plan? ..... ☐ ☐
- 13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? ..... ☐ ☐
- 14 a Did you convert all or part of a regular IRA into a Roth IRA? ..... ☐ ☐  
 b Did you roll over all or part of a qualified plan into a Roth IRA? ..... ☐ ☐
- 15 Did you contribute to a Coverdell Education Savings Account? ..... ☐ ☐

### ITEMS RELATED TO INCOME/LOSSES

Yes No

- 16 Did you receive any disability payments in 2023 ? ..... ☐ ☐
- 17 Did you receive tip income **not** reported to your employer? ..... ☐ ☐
- 18 Did you buy, sell, refinance, or abandon a principal residence or other real property in 2023 ?  
 (Attach copies of any escrow statements or Forms 1099.) ..... ☐ ☐
- 19 a If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? ..... ☐ ☐  
 b Are you planning to purchase a home soon? ..... ☐ ☐  
 c Did you incur any casualty or theft losses during 2023 ? ..... ☐ ☐
- 20 Did you incur any non-business bad debts? ..... ☐ ☐

### PRIOR YEAR TAX RETURNS

Yes No

- 21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? ..... ☐ ☐  
 If **yes**, enclose agent's report or notice of change.
- 22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? ..... ☐ ☐

## General Questions (continued)

ORG3

## FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

	Yes	No
23 Did you have foreign income or pay any foreign taxes in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
24a At any time during 2023, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2023 ? Report all interest income on Org 11 .....	<input type="checkbox"/>	<input type="checkbox"/>
25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
26 Did you at any time during 2023, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year? .....	<input type="checkbox"/>	<input type="checkbox"/>

## HEALTH AND LIFE INSURANCE

	Yes	No
27 Did you receive Form 1095-A (Health Coverage)? If so, please attach .....	<input type="checkbox"/>	<input type="checkbox"/>
28a Did you or your spouse have self-employed health insurance? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job? .....	<input type="checkbox"/>	<input type="checkbox"/>
29 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? .....	<input type="checkbox"/>	<input type="checkbox"/>
30 Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....	<input type="checkbox"/>	<input type="checkbox"/>

## MISCELLANEOUS

	Yes	No
31 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023 ? If yes, please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
32 Did you purchase a motor vehicle or boat during 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, attach documentation showing sales tax paid.		
33 Did you purchase an energy efficient vehicle in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, enter year, make, model, and date purchased: _____ also provide VIN: _____		
34 Did you donate a vehicle in 2023 ? If yes, attach Form 1098C .....	<input type="checkbox"/>	<input type="checkbox"/>
35 What was the sales tax rate in your locality in 2023 ? _____ % State ID .....		
36 Did you or your spouse make gifts of over \$17,000 to an individual or contribute to a prepaid tuition plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
37 Did you make gifts to a trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
38 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach details.		
39 Did you or your spouse participate in a medical savings account in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
40 Did you make a loan at an interest rate below market rate? .....	<input type="checkbox"/>	<input type="checkbox"/>
41 Did you pay any individual for domestic services in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
42 Did you pay interest on a student loan for yourself, your spouse, or your dependents? .....	<input type="checkbox"/>	<input type="checkbox"/>
43 Did you, your spouse, or your dependents attend post-secondary school in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
44 Did a lender cancel any of your debt in 2023 ? (Attach any Forms 1099-A or 1099-C) .....	<input type="checkbox"/>	<input type="checkbox"/>
45 Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach information.		
46 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ..	<input type="checkbox"/>	<input type="checkbox"/>
47 Did you obtain a Paycheck Protection Program (PPP) loan? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, has any portion of that loan been forgiven? .....	<input type="checkbox"/>	<input type="checkbox"/>
48a Do you want to change the language with which the IRS communicates with you? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language? .....		

## ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

	Yes	No
49 If your tax return is eligible for Electronic Filing, would you like to file electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
50 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>Caution:</b> Review transferred information for accuracy.		
51 If yes, please provide the following information:		
a Name of your financial institution .....		
b Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....		
c Account number .....		
d What type of account is this? .....Checking <input type="checkbox"/> Savings <input type="checkbox"/>		
<input checked="" type="checkbox"/> Please attach a voided check (not a deposit slip) if your bank account information has changed.		

**Business/Investment Questions****ORG4**

	Yes	No
<b>1</b> Did you receive stock from a stock bonus plan with your employer? ..... (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>2</b> Did you buy or sell any stocks or bonds in 2023 ? ..... If <b>yes</b> , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did you surrender any U.S. savings bonds during 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>6</b> Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> Do you have any investments for which you were <b>not</b> personally 'at risk' (other than sole proprietorship or farm)? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>8</b> Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Did you sell property or equipment on installment in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>10</b> Did you have any business related educational expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b> Did you do a 'like-kind' exchange of property in 2023 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>12</b> Deductions for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: <b>1</b> Amount; <b>2</b> Time and place; <b>3</b> Date; <b>4</b> Business purpose; <b>5</b> Description of gift(s); and <b>6</b> Business relationship of recipient Do you have records to support expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>13</b> Did you purchase special fuels for non-highway use? ..... If <b>yes</b> , please list the type of use and the number of gallons for each fuel. _____ _____ _____ _____ _____	<input type="checkbox"/>	<input type="checkbox"/>

**W-2 – WAGES, SALARIES, TIPS, AND OTHER COMPENSATION****Attach all copies of your W-2 forms here.**

<b>1</b>	Employer's name .....	Check if not applicable for 2023 .....	<input type="checkbox"/>
	Employer's name .....	Check if for spouse .....	<input type="checkbox"/>
	<b>1</b> Check if this employer hired an on-staff care provider or furnished dependent care at your workplace .....		<input type="checkbox"/>
	<b>2</b> Enter any amounts forfeited from a flexible spending account .....		
	<b>3</b> Check if the income reported is from a foreign source .....		<input type="checkbox"/>
	<b>4 a</b> Clergy: Enter your designated housing or parsonage allowance .....		
	<b>b</b> Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value.....		
	<b>c</b> Check SE tax on: <b>(a)</b> housing or parsonage allowance.....	<input type="checkbox"/>	<b>(b)</b> W-2 wages..... <input type="checkbox"/> <b>(c)</b> both..... <input type="checkbox"/>

  

<b>2</b>	Employer's name .....	Check if not applicable for 2023 .....	<input type="checkbox"/>
	Employer's name .....	Check if for spouse .....	<input type="checkbox"/>
	<b>1</b> Check if this employer hired an on-staff care provider or furnished dependent care at your workplace .....		<input type="checkbox"/>
	<b>2</b> Enter any amounts forfeited from a flexible spending account .....		
	<b>3</b> Check if the income reported is from a foreign source .....		<input type="checkbox"/>
	<b>4 a</b> Clergy: Enter your designated housing or parsonage allowance .....		
	<b>b</b> Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value.....		
	<b>c</b> Check SE tax on: <b>(a)</b> housing or parsonage allowance.....	<input type="checkbox"/>	<b>(b)</b> W-2 wages..... <input type="checkbox"/> <b>(c)</b> both..... <input type="checkbox"/>

**1099-R – DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC****Attach all copies of your 1099-R forms here.**

<b>1</b>	Payer's name.....	Check if not applicable for 2023 .....	<input type="checkbox"/>	
	Payer's name.....	Check if for spouse .....	<input type="checkbox"/>	
	<b>1</b> Check if either box applies: Rollover .....	<input type="checkbox"/>	Conversion to Roth IRA .....	<input type="checkbox"/>
	<b>2 a</b> If a <b>partial</b> rollover, enter the amount rolled over .....			
	<b>b</b> If a <b>partial</b> conversion to a Roth IRA, enter the amount converted to Roth IRA .....			
	<b>3</b> Health insurance premiums deductible on Schedule A.....			
	<b>4 a</b> If entire distribution is a Required Minimum Distribution (RMD), check this box .....		<input type="checkbox"/>	
	<b>b</b> If <b>only part</b> of distribution is RMD, enter the part that is RMD.....			

  

<b>2</b>	Payer's name.....	Check if not applicable for 2023 .....	<input type="checkbox"/>	
	Payer's name.....	Check if for spouse .....	<input type="checkbox"/>	
	<b>1</b> Check if either box applies: Rollover .....	<input type="checkbox"/>	Conversion to Roth IRA .....	<input type="checkbox"/>
	<b>2 a</b> If a <b>partial</b> rollover, enter the amount rolled over .....			
	<b>b</b> If a <b>partial</b> conversion to a Roth IRA, enter the amount converted to Roth IRA .....			
	<b>3</b> Health insurance premiums deductible on Schedule A.....			
	<b>4 a</b> If entire distribution is a Required Minimum Distribution (RMD), check this box .....		<input type="checkbox"/>	
	<b>b</b> If <b>only part</b> of distribution is RMD, enter the part that is RMD.....			

**W-2G – GAMBLING OR LOTTERY WINNINGS****Attach all copies of your W-2G forms here.**

Name of Payer	Check if Spouse	Reportable Winnings (Box 1)	Federal Tax Withheld (Box 4)	State Tax Withheld (Box 15)	State Code (Box 13)
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

# Social Security Benefits/Form 1099-G/Other Income

ORG10

## SOCIAL SECURITY BENEFITS

☒ Attach all copies of SSA and RRB forms.

Taxpayer

Spouse

1	Social Security Benefits from Form SSA-1099.....		
2	Federal income tax withheld from Form SSA-1099 .....		
3	Medicare B premiums withheld from Form SSA-1099 .....		
4	Medicare C premiums withheld from Form SSA-1099 .....		
5	Medicare D premiums withheld from Form SSA-1099 .....		
6	Railroad Retirement Benefits from Form RRB-1099 .....		
7	Federal income tax withheld from Form RRB-1099 .....		
8	Medicare premiums withheld from Form RRB-1099.....		

## FORM 1099-G

☒ Attach all copies of 1099-G forms.

Box	Description	Payer 1	Payer 2	Payer 3
	Check if Spouse .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Check if Joint.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payer's name.....			
1	Unemployment compensation .....			
a	Unemployment benefits you repaid in 2023 .....			
2	State and local income tax refunds .....			
3	Enter the tax year from 1099-G box 3 .....			
a	If tax year is 2022 or prior, enter the taxable portion of the amount reported in box 2 .....			
4	Federal income tax withheld .....			
5	RTAA payments.....			
6	Taxable grants .....			
7	Agriculture payments .....			
8	Check if box 2 amount is from trade or business .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Market gain .....			
10a	Two-letter state abbreviation .....	_____	_____	_____
	Two or three-letter local abbreviation .....	_____	_____	_____
b	State identification number .....			
11	State income tax withheld.....			

## OTHER INCOME

	Nature and Source	2023 Taxpayer	2023 Spouse	2022 Combined
1	Alimony received .....			
2	Recovery of bad debts previously deducted .....			
3	Jury duty pay .....			
4	Gambling winnings not reported on W2G/1099.....			
5	Income from not for profit activities (hobbies).....			
6	Income from the rental of personal property.....			
7	Non-Government unemployment received/repaid in 2023 .....			
8	Other Taxable income:			
a	Union unemployment benefits.....			
b	Private fund unemployment benefits .....			
c	State employee unemployment benefits .....			
9	Other miscellaneous income items:			
	Description:			

# Interest and Dividend Income

ORG11

T = Taxpayer, S = Spouse, J = Joint

## INTEREST INCOME

☒ Attach all copies of your Form 1099-INTs here.

**\*\*Type of Interest**

blank = Regular taxable interest

ME1 = ME bond interest in federal income

MD1 = MD nontaxable interest — taxable federal

MA1 = MA bank interest

NH1 = NH nontaxable interest — taxable federal

NJ1 = NJ nontaxable interest — taxable federal

OK1 = OK bank interest

TN1 = TN nontaxable interest — taxable federal

WV1 = WV bond interest in federal income

TSJ	X*	Payer Name	2023 Box 1 Interest	Type of Interest**	2023 Box 3 US/Treasury Interest	2023 Box 8 Tax Exempt	State	2022 Box 1 + 3

X\* Check if you did not receive income from this account in 2023 .

## DIVIDEND INCOME

☒ Attach all copies of your Form 1099-DIVs here.

TSJ	X*	Payer Name	2023 Box 1a Ordinary Dividends	2023 Box 1b Qualified Dividends	2023 Box 2a Capital Gains	State	2022 Box 1a + 2a

X\* Check if you did not receive income from this account in 2023 .

# Medical and Tax Expenses

ORG13

MEDICAL AND DENTAL EXPENSES		2023	2022
1	Prescription medications .....		
2	Health insurance premiums (enter Medicare B on ORG10)..... Exclude premiums paid through an exchange (Form 1095-A)		
3	Qualified long-term care premiums		
a	Taxpayer's gross long-term care premiums .....		
b	Spouse's gross long-term care premiums .....		
c	Dependent's gross long-term care premiums .....		
4	Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity .....		
5	Insurance reimbursement.....		
6	Doctors, dentists, etc .....		
7	Hospitals, clinics, etc .....		
8	Lab and X-ray fees.....		
9	Expenses for qualified long-term care .....		
10	Eyeglasses and contact lenses .....		
11	Medical equipment and supplies .....		
12	Miles driven for medical purposes 01/01/2023 thru 12/31/2023 .....		
13	Ambulance fees and other medical transportation costs .....		
14	Lodging.....		
15	Other medical and dental expenses:		
a	_____		
b	_____		
c	_____		
d	_____		
e	_____		
f	_____		
g	_____		
h	_____		
i	_____		
j	_____		
TAXES		2023	2022
Enter state and local income taxes on <b>ORG7, ORG8, ORG10, and ORG40.</b>			
16	Real estate taxes paid on principal residence .....		
17	Real estate taxes paid on additional homes or land .....		
18	Auto registration fees based on the value of the vehicle .....		
19	Other personal property taxes .....		
20	Other taxes:		
	_____		
	_____		



# Interest Paid and Cash Contributions

ORG14

HOME MORTGAGE INTEREST PAID			
Lender's Name	Check if NOT on Form 1098	2023	2022
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME		
Lender's Name	Check if NOT on Form 1098	2023
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

SELLER FINANCED MORTGAGE		
Individual's Name	Identifying Number	Address

OTHER PERSON RECEIVING FORM 1098	
Form 1098 Recipient's Name	Address

OTHER POINTS					
Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.					
Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2022 Points Deducted
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

QUALIFIED MORTGAGE INSURANCE PREMIUMS		
	2023	2022
Premiums paid in 2023 for qualified mortgage insurance <b>not</b> from Form 1098 import .....		

## Interest Paid and Cash Contributions (continued)

ORG14

INVESTMENT INTEREST		
	2023	2022
Investment interest (for example: margin interest, interest paid on loans used for property held for investment, etc) .....		

LIMITED HOME MORTGAGE DEDUCTION					
If the mortgage meets the following reasons during 2023 complete the following: - The principal amount of your mortgage and home equity debt is over \$750,000 (\$375,000 if married filing separate), or - You had home debt that was not used to buy, build or substantially improve the home that secures the loan					
	Loan 1	Loan 2	Loan 3	Loan 4	Loan 5
<b>1a</b> Interest paid in 2023 .....					
Points paid in 2023 .....					
Months loan outstanding .....					
Principal pd on loan in 2023 .....					
<b>b</b> Was all proceeds of this loan used to buy, build, or substantially improve the home? <div style="display: flex; justify-content: space-between;"> <span>Yes: <input type="checkbox"/> No: <input type="checkbox"/></span> <span>Yes: <input type="checkbox"/> No: <input type="checkbox"/></span> <span>Yes: <input type="checkbox"/> No: <input type="checkbox"/></span> <span>Yes: <input type="checkbox"/> No: <input type="checkbox"/></span> <span>Yes: <input type="checkbox"/> No: <input type="checkbox"/></span> </div>					
<b>2</b> Home Debt Origination on or after December 15, 2017					
Beginning of year balance ..					
Additional borrowed in 2023 .....					
Enter the amount of debt not used to buy, build, or substantially improve the home:					
<b>3</b> Home Debt Origination after October 13, 1987 and Before December 15, 2017					
Beginning of year balance ..					
Enter the amount of debt not used to buy, build, or substantially improve the home:					
<b>4</b> Grandfathered debt: (before 10/14/1987)					
Beginning of year balance ..					
Enter the amount of debt not used to buy, build, or substantially improve the home:					

CASH CONTRIBUTIONS			
Name of Donee Organization	Check if Statement Exists for Gifts \$250 or More	2023	2022
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
Charitable miles driven .....			
Miles driven to deliver noncash contributions .....			
Parking fees, tolls, and local transportation .....			

# Noncash Contributions

ORG14A

Name of Donee Organization	Check if Statement Exists for Gifts of \$250 or More	Fair Market Value	Prior Year Fair Market Value
A			
B			
C			
D			
E			
F			
G			
H			
I			

**Note:** Complete sections below **only** if the **total** noncash contributions are **more than \$500**.

Description of Donated Property	Type**	Address of Donee Organization
A		
B		
C		
D		
E		
F		
G		
H		
I		

Method for Fair Market Value*	Date of Contribution	Complete these columns <b>only</b> for each contribution over \$500		
		Date Acquired (month, year)	How Acquired***	Your Cost
A				
B				
C				
D				
E				
F				
G				
H				
I				

## \*Methods of determining FMV:

Appraisal	Capitalization of income	Present value	Thrift shop
Average share	Comparative sales	Replacement cost	
Catalog	Consignment shop	Reproduction cost	

## \*\*Type of Donated Property

Household/clothing items	Business equipment	Intellectual property
Motor vehicle, boat or airplane	Business inventory	Real property, conservation property
Art, other than self-created	Stock, publicly traded	Real property, other than conservation
Art, self-created	Stock, other than publicly traded	Other personal property
Collectibles	Securities, other than stock	Other intangible property

\*\*\*How Property was Acquired: Purchase, Gift, Inheritance, Exchange

# Business Income and Expenses

ORG19

## GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

1 Check ownership ☐ Taxpayer ☐ Spouse ☐ Joint

2 Business name .....

3 a Business street address.....

b 1 City, State and Zip Code, or .....

2 Foreign country.....

4 Principal business/profession .....

5 Employer ID number.....

6 Business code (Preparer Use Only) .....

Yes No

7 Was this business fully disposed of in a fully taxable transaction during 2023 ? ☐ Yes ☐ No

8 Accounting method:

Cash ☐ Accrual ☐ Other (specify) ☐ .....

9 Method used to value closing inventory:

Cost ☐ Lower of cost or market ☐ Other (explain) ☐ .....

Yes No

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory?

(If yes, attach explanation) .....

11 Did you materially participate in the operation of this business during 2023 ? .....

12 Did you start or acquire this business during 2023 ? .....

13 a Did you make any payments in 2023 that require you to file Forms 1099? .....

b If yes, did you or will you file all the required Forms 1099? .....

14 At-risk determination:

a Is all of the investment in this activity at risk? .....

b Is some of the investment in this activity not at risk? .....

15 Did you have unallowed passive losses in 2022 ? .....

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? .....

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular ☐ Extension ☐ No ☐

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....

d Was this business located in a Qualified Disaster Area? .....

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2023	2022
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund) .....		

COST OF GOODS SOLD – IF APPLICABLE	2023	2022
20 Inventory at beginning of year .....		
21 Purchases .....		
22 Items withdrawn for personal use .....		
23 Cost of labor (do not include your salary) .....		
24 Materials and supplies .....		
25 Other costs .....		
26 Inventory at end of year.....		

# Business Income and Expenses (continued)

ORG19

EXPENSES	2023	2022
Business name _____		
<b>27</b> Advertising .....		
<b>28</b> Car and truck expenses (complete ORG18).....		
<b>29</b> Commissions and fees .....		
<b>30</b> Contract labor .....		
<b>31</b> Depletion .....		
<b>32</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>33</b> Employee benefit programs:		
<b>a</b> Employee health insurance premiums .....		
<b>b</b> Other employee benefit programs .....		
<b>34</b> Insurance (other than health) .....		
<b>35</b> Self-employed health insurance attributable to this business .....		
<b>36</b> Interest:		
<b>a</b> Mortgage paid to banks not reported to you on Form 1098.....		
<b>b</b> Other .....		
<b>37</b> Legal and professional services .....		
<b>38</b> Office expenses .....		
<b>39</b> Pension and profit-sharing plans .....		
<b>40</b> Rent or lease:		
<b>a</b> Machinery and equipment (enter vehicle lease on ORG18) .....		
<b>b</b> Other business property.....		
<b>41</b> Repairs and maintenance .....		
<b>42</b> Supplies (not included in cost of goods sold) .....		
<b>43</b> Taxes and licenses not reported to you on Form 1098 .....		
<b>44</b> Travel and meals		
<b>a</b> Travel.....		
<b>b</b> Meals subject to 50% limit.....		
<b>c</b> Meals subject to 80% limit.....		
<b>d</b> Meals not subject to limit .....		
<b>45</b> Utilities .....		
<b>46</b> Gross wages .....		
<b>47</b> Other expenses:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
<b>48</b> Expenses for business use of your home <b>(Preparer Use Only)</b> .....		
Complete ORG20 for Business Use of Home.		
<b>49</b> Qualified pension plan start-up costs .....		
<b>50</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>before</b> Jan. 1, 2018.....		
<b>51</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>after</b> Dec. 31, 2017 .....		

**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....			
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles 01/01/2023 thru 12/31/2023.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No

# Business Use of Home

ORG20

for:

copy:

Simplified method election for Home Office expenses: Elect the simplified method **in 2020** instead of entering actual expenses

Elected the simplified method **in 2019** instead of entering actual expenses

<input type="checkbox"/>
<input type="checkbox"/>

GENERAL INFORMATION		2023	2022
1	Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage) .....		
2	Area used only partly for day care (square footage) .....		
3	Total area of home (square footage) .....		
4	Daycare hours		
a	Number of weeks used for day care, if less than full year .....		
b	Number of days used for day care each week .....		
c	Number of days closed for holidays, vacations, etc. ....		
d	Number of hours used for day care each day .....		
e	Total hours used for day care .....		
f	Total hours available for use .....		
5	Enter the date you began using this home office for this business .....		
6	If part of your income is from a place of business other than this home, enter % of gross income from business use of this home .....		
7	Adjustment to gain from business use of home shown on Schedule D or Form 4797 (Preparer Use Only) .....		
8	Adjustment to losses from this business shown on Schedule D or Form 4797 (Preparer Use Only) .....		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

EXPENSES	2023		2022	
	Direct	Indirect	Direct	Indirect
9 Casualty losses (Preparer Use Only) .....				
10 Total mortgage interest/points .....				
11 Mortgage interest/points on Form 1098 .....				
12 Interest <b>not</b> on Form 1098 .....				
13 Points <b>not</b> of Form 1098 .....				
14 Real estate taxes .....				
15 Excess mortgage interest (Preparer Use) .....				
16 Excess real estate taxes (Preparer Use) .....				
17 Qualified mortgage insurance .....				
18 Other insurance .....				
19 Rent .....				
20 Repairs and maintenance .....				
21 Utilities .....				
22 Other expenses (e.g., rent) .....				
23 Carryover of operating expenses .....				
24 Excess casualty losses (Preparer Use Only) .....				
25 Depreciation of your home (Preparer Use Only) .....				
26 Carryover of excess casualty losses and depreciation .....				

## DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this business, please complete the following information.

26	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence .....			
	Addition/Improvement .....			
	Addition/Improvement .....			
	Addition/Improvement .....			
	Addition/Improvement .....			
27	Enter the land value included in cost for residence .....			

# Rent and Royalty Income and Expenses

ORG25

## BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: \_\_\_\_\_

Is this activity a qualified trade or business under Section 199A? ..... ☐ Yes ☐ No

- 1 Check property owner ..... ☐ Taxpayer ☐ Spouse ☐ Joint Yes No
- 2 a Did you make any payments that would require you to file Form(s) 1099? ..... ☐ ☐
- b If yes, did you or will you file all required Forms(s) 1099? ..... ☐ ☐
- 3 a Enter the ownership percentage (if not 100%) ..... \_\_\_\_\_
- b If not 100%, are you reporting 100% of the income and expenses? ..... ☐ ☐
- 4 Is this a rental property? (If yes, answer questions 5 through 11; if no, skip to question 12.) ..... ☐ ☐
- 5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? ..... ☐ ☐
- 6 For all rental properties, enter the number of days during 2023 that:
- a The property was rented at fair rental value ..... \_\_\_\_\_
- b The property was used personally or rented at less than fair rental value ..... \_\_\_\_\_
- c You owned the property, if not the entire year ..... \_\_\_\_\_
- 7 a Does this rental have multiple living units and you live in one of the units? ..... ☐ ☐
- b If yes, enter percentage of rental use ..... \_\_\_\_\_
- 8 Did you actively participate in this property's management during 2023 ? ..... ☐ ☐
- 9 Did you materially participate in this property's management during 2023 ? ..... ☐ ☐
- 10 Do you want to treat this property as non-passive? ..... ☐ ☐
- 11 Did this property have unallowed passive losses in 2022 ? ..... ☐ ☐
- 12 Did you dispose of this property in a fully taxable transaction? ..... ☐ ☐
- 13 Check this box if some of this investment was not at-risk ..... ☐
- 14 a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... ☐ ☐
- b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... Regular ☐ Extension ☐ No ☐
- c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... ☐ ☐
- d Was this activity located in a Qualified Disaster Area? ..... ☐ ☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME		2023	2022
15 Rents or royalties received .....			
<div> <div>* Property Types:</div> <div> <div>1 Single family residence</div> <div>2 Multi-family residence</div> <div>3 Vacation/short-term rental</div> <div>4 Commercial</div> </div> <div> <div>5 Land</div> <div>6 Royalties</div> <div>7 Self-rental</div> <div>8 Other</div> </div> </div>			



# Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2023	2022
Property location .....		
16 Advertising .....		
17 a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance .....		
19 Commissions.....		
20 a Mortgage insurance premiums — qualified .....		
b Other insurance .....		
21 Legal and professional fees .....		
22 Management fees .....		
23 a Mortgage interest paid to banks — qualified.....		
b Mortgage interest paid to banks — other.....		
24 Other interest .....		
25 Repairs.....		
26 Supplies.....		
27 a Real estate taxes.....		
b Other taxes .....		
28 Utilities .....		
29 Other expenses:		
a .....		
b .....		
c .....		
d .....		
e .....		
30 a Depreciation and Section 179 deduction (Preparer Use Only).....		
b Depletion (Preparer Use Only).....		

**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....			
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles 01/01/2023 thru 12/31/2023.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No

# Farm Rental Income and Expenses

ORG26

## GENERAL INFORMATION

Name of this activity .....

Is this activity a qualified trade or business under Section 199A? ..... ☐ Yes ☐ No

1 Check ownership ..... ☐ Taxpayer ☐ Spouse ☐ Joint

2 Employer identification number .....

3 Was this farm fully disposed of in a fully taxable transaction during 2023? ..... ☐ Yes ☐ No

4 Did you actively participate in the operation of this business during 2023? ..... ☐ Yes ☐ No

5 Real estate professionals:  
Did you materially participate in the operation of this business during 2023? ..... ☐ Yes ☐ No

6 At-risk determination:

a Is all of the investment in this activity at risk? ..... ☐ Yes ☐ No

b Is some of the investment in this activity not at risk? ..... ☐ Yes ☐ No

c Did you receive a subsidy in 2023? ..... ☐ Yes ☐ No

7 Did you have unallowed passive losses in 2022? ..... ☐ Yes ☐ No

8 a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... ☐ Yes ☐ No

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... ☐ Regular ☐ Extension ☐ No

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... ☐ Yes ☐ No

d Was this farm rental located in a Qualified Disaster Area? ..... ☐ Yes ☐ No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

FARM RENTAL INCOME – BASED ON PRODUCTION	2023	2022
9 Income from production of livestock, produce, grains and crops .....		
10 Total distributions received from cooperatives .....		
11 Taxable amount of distributions from cooperatives .....		
12 Total agricultural program payments .....		
13 Taxable amount of agricultural program payments .....		
14 Commodity Credit Corporation (CCC) loans under election .....		
15 CCC loans forfeited/repaid with certificates .....		
16 Taxable amount of CCC loans forfeited/repaid.....		
17 Crop insurance proceeds/federal crop disaster payments received in 2023 .....		
18 Taxable crop insurance proceeds/federal crop disaster payments .....		
19 Crop insurance proceeds/federal crop disaster deferred from 2022 .....		
20 Other income – include federal/state gas tax credit/refund .....		

# Farm Rental Income and Expenses (continued)

ORG26

EXPENSES – FARM RENTAL PROPERTY	2023	2022
Name of this activity .....		
<b>21</b> Car and truck expense (complete ORG18) .....		
<b>22</b> Chemicals .....		
<b>23</b> Conservation expenses .....		
<b>24</b> Custom hire (machine work) .....		
<b>25</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>26</b> Employee benefit programs other than pension and profit-sharing plans .....		
<b>27</b> Feed .....		
<b>28</b> Fertilizers and lime.....		
<b>29</b> Freight and trucking.....		
<b>30</b> Gasoline, fuel, and oil .....		
<b>31</b> Insurance (other than health) .....		
<b>32</b> Interest:		
<b>a</b> Mortgage (paid to banks, etc).....		
<b>b</b> Other .....		
<b>33</b> Labor hired .....		
<b>34</b> Pension and profit-sharing plans .....		
<b>35</b> Rent or lease:		
<b>a</b> Machinery, equipment, etc (for vehicle rent or lease, see ORG18) .....		
<b>b</b> Other (land, animals, etc) .....		
<b>36</b> Repairs and maintenance .....		
<b>37</b> Seeds and plants.....		
<b>38</b> Storage and warehousing.....		
<b>39</b> Supplies.....		
<b>40</b> Taxes.....		
<b>41</b> Utilities .....		
<b>42</b> Veterinary fees and medicine .....		
<b>43</b> Other expenses (specify):		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
<b>44</b> Qualified pension plan start-up costs.....		
<b>45</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>before</b> Jan. 1, 2018 .....		
<b>46</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>after</b> Dec. 31, 2017.....		

**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....			
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles 01/01/2023 thru 12/31/2023.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No

# Farm Income and Expenses

ORG27

## GENERAL INFORMATION

Name of this farm .....

Is this activity a qualified trade or business under Section 199A? ..... ☐ Yes ☐ No

1 Check ownership ..... ☐ Taxpayer ☐ Spouse ☐ Joint

2 Principal product .....

3 Employer identification number .....

4 Agricultural activity code (Preparer Use Only) .....

5 Accounting method ..... ☐ Cash ☐ Accrual

6 Was this farm fully disposed of in a fully taxable transaction during 2023? ..... ☐ Yes ☐ No

7 Did you materially participate in the operation of this business during 2023? ..... ☐ Yes ☐ No

8 Did you make any payments in 2023 that would require you to file Form(s) 1099 ..... ☐ Yes ☐ No

9 If 'Yes,' did you or will you file all required Forms 1099? ..... ☐ Yes ☐ No

10 At-risk determination:

a Is all of the investment in this activity at risk? ..... ☐ Yes ☐ No

b Is some of the investment in this activity not at risk? ..... ☐ Yes ☐ No

c Did you receive a subsidy in 2023? ..... ☐ Yes ☐ No

11 Did you have unallowed passive losses in 2022? ..... ☐ Yes ☐ No

12a Treat all MACRS assets for this activity as qualified Indian reservation property? ..... ☐ Yes ☐ No

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... Regular ☐ Extension ☐ No ☐

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... ☐ Yes ☐ No

d Was this farm located in a Qualified Disaster Area? ..... ☐ Yes ☐ No

FARM INCOME – CASH METHOD	2023	2022
13 Sales of livestock, etc purchased for resale .....		
14 Cost/Basis of livestock, etc purchased for resale .....		
15 Sales of livestock, produce, grains, etc raised .....		
16a Total distributions received from cooperatives .....		
b Taxable amount of distributions from cooperatives .....		
17a Total agricultural program payments .....		
b Taxable amount of agricultural program payments .....		
c If you received social security retirement or disability benefits, enter any Conservation Reserve Program payments included on line 15 .....		
18a Commodity Credit Corporation (CCC) loans under election .....		
b CCC loans forfeited/repaid with certificates .....		
c Taxable amount of CCC loans forfeited/repaid .....		
19a Crop insurance proceeds/federal crop disaster payments received in 2023 .....		
b Taxable crop insurance proceeds/federal crop disaster payments .....		
c Crop insurance proceeds/federal crop disaster payments deferred from 2022 .....		
20 Custom hire (machine work) income .....		
21 Other income – include federal/state gas tax credit/refund .....		

FARM INCOME – ACCRUAL METHOD	2023	2022
22 Sales – livestock, produce, grain, other products .....		
23a Total distributions received from cooperatives .....		
b Taxable amount of distributions from cooperatives .....		
24a Total agricultural program payments .....		
b Taxable amount of agricultural program payments .....		
25a Commodity Credit Corporation (CCC) loans under election .....		
b CCC loans forfeited/repaid with certificates .....		
c Taxable amount of CCC loans forfeited/repaid .....		
26 Crop insurance proceeds and certain disaster payments .....		
27 Custom hire (machine work) income .....		
28 Other income include federal/state gas tax credit/refund .....		

## Farm Income and Expenses (continued)

ORG27

FARM INCOME – ACCRUAL METHOD (continued)	2023	2022
<b>29</b> Cost of Goods Sold:		
<b>a</b> Beginning inventory – livestock, produce, etc .....		
<b>b</b> Cost of livestock, produce, etc purchased .....		
<b>c</b> Ending inventory – livestock, produce, etc .....		
<b>30</b> Check if you used the unit-livestock price method or farm-price method to value inventory.....	<input type="checkbox"/>	<input type="checkbox"/>
Complete ORG51 for acquisitions and ORG50 for dispositions.		

FARM EXPENSES – CASH AND ACCRUAL METHODS	2023	2022
Name of this farm .....		
<b>31</b> Car and truck expense (complete ORG18) .....		
<b>32</b> Chemicals .....		
<b>33</b> Conservation expenses .....		
<b>34</b> Custom hire (machine work) .....		
<b>35</b> Depreciation and Section 179 deduction ( <b>Preparer Use Only</b> ) .....		
<b>36</b> Employee benefit programs other than pension and profit-sharing plans .....		
<b>37</b> Feed .....		
<b>38</b> Fertilizers and lime.....		
<b>39</b> Freight and trucking.....		
<b>40</b> Gasoline, fuel and oil .....		
<b>41 a</b> Insurance (other than health) .....		
<b>b</b> Self-employed health insurance attributable to this farm business.....		
<b>42</b> Interest:		
<b>a</b> Mortgage (paid to banks, etc) .....		
<b>b</b> Other .....		
<b>43</b> Labor hired .....		
<b>44</b> Pension and profit-sharing plans .....		
<b>45</b> Rent or lease:		
<b>a</b> Machinery, equipment, etc (for vehicle rent or lease, see ORG18) .....		
<b>b</b> Other (land, animals, etc) .....		
<b>46</b> Repairs and maintenance .....		
<b>47</b> Seeds and plants purchased .....		
<b>48</b> Storage and warehousing.....		
<b>49</b> Supplies purchased .....		
<b>50</b> Taxes.....		
<b>51</b> Utilities .....		
<b>52</b> Veterinary, breeding and medicine.....		
<b>53</b> Other expenses (specify):		
_____		
_____		
_____		
_____		
_____		
<b>54</b> Qualified pension plan start-up costs.....		
<b>55</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>before</b> Jan. 1, 2018 .....		
<b>56</b> DPAD (line 6) from cooperative(s) with tax year beginning <b>after</b> Dec. 31, 2017 .....		

**Car And Truck Expenses**  
(Employees use ORG17 – Employee Business Expenses)

**ORG18**

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....			
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles 01/01/2023 thru 12/31/2023.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes, is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No



# Child and Dependent Care Expenses

ORG35

## CHILD AND DEPENDENT CARE EXPENSES

Enter below the persons or organizations who provided the child and dependent care.

<b>First Name (if person) Last Name (if person) OR Provider Business Name Additional Business Name</b>	<b>Provider Address</b>	<b>ID Number SSN on first line OR EIN on second line</b>	<b>Amount Paid</b>
<b>Provider Phone</b>			
<b>1</b> ..... ..... .....	..... ..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... ..... Tax-Exempt .. <input type="checkbox"/>	..... ..... ..... Foreign ..... <input type="checkbox"/>
<b>2</b> ..... ..... .....	..... ..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... ..... Tax-Exempt .. <input type="checkbox"/>	..... ..... ..... Foreign ..... <input type="checkbox"/>
<b>3</b> ..... ..... .....	..... ..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... ..... Tax-Exempt .. <input type="checkbox"/>	..... ..... ..... Foreign ..... <input type="checkbox"/>
<b>4</b> ..... ..... .....	..... ..... ..... Care at above address? ..... <input type="checkbox"/>	..... ..... ..... Tax-Exempt .. <input type="checkbox"/>	..... ..... ..... Foreign ..... <input type="checkbox"/>

## EXPENSES

**2023**

**2022**

<b>1</b> Total employment taxes paid on wages for child care expenses .....		
<b>2</b> Total expenses paid in 2023 but not incurred in 2023 .....		
<b>3</b> Total expenses incurred in 2023 but not paid in 2023 .....		
<b>4</b> Medical expenses paid for qualifying persons unable to care for themselves .....		

## STUDENT/DISABLED PERSON INFORMATION FOR 2023

**Taxpayer**

**Spouse**

<b>5</b> If taxpayer or spouse was a full-time student or disabled in 2023, answer the following questions:  <b>a</b> Number of months that taxpayer/spouse was a full-time student or disabled .....		
<b>b</b> Did taxpayer or spouse work and earn less than \$250/\$500 during the months entered on line 5a? If No, leave line 5b blank. If Yes, multiply the number of months working and earning less by either \$250/\$500 and enter that amount here .....		

# State Information Worksheet

ORG60

## GENERAL INFORMATION

	<b>Taxpayer</b>	<b>Spouse</b>
1 Enter your state of residence .....	_____	_____
2 Check the appropriate box if:	<b>Taxpayer</b>	<b>Spouse</b>
a Full year resident.....	<input type="checkbox"/>	<input type="checkbox"/>
b Part year resident .....	<input type="checkbox"/>	<input type="checkbox"/>
c Nonresident .....	<input type="checkbox"/>	<input type="checkbox"/>
	Date of entry: _____	Date of exit: _____
3 Resident locality: _____		
4 County: _____	School district: _____	School district number: _____
	<b>Taxpayer</b>	<b>Spouse</b>
5 Check if disabled .....	<input type="checkbox"/>	<input type="checkbox"/>

## STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## MISCELLANEOUS QUESTIONS

	<b>Yes</b>	<b>No</b>
8 Did you file a state return for 2022 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you want state forms and instructions sent to you next year? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you want any applicable penalty and interest calculated and added to the return? .....	<input type="checkbox"/>	<input type="checkbox"/>
11 How do you want your state refund (if any) applied?		
a Refunded ..... <input type="checkbox"/>	b Apply to 2024 estimates ..... <input type="checkbox"/>	c Apply to 2024 taxes ..... <input type="checkbox"/>
12 Additional state information: _____		
_____		
_____		