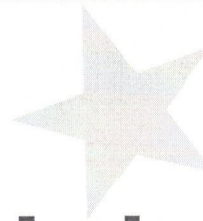
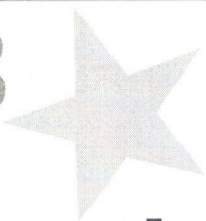


# 2023



# Tax Appointment Worksheet

The Tax Appointment Worksheet is a tool to help you gather the needed information for new and returning clients for the 2023 tax year.

## Personal Information

The IRS needs to know exactly who's filing and who is covered in your tax return. To do this, you will need Social Security numbers and dates of birth for you, your spouse and dependents.

## Information About Your Income

- Income from jobs: forms W-2 for you and your spouse
- Investment Income — various forms 1099 (-INT, DIV, -B, etc.) K-1's, stock information
- Income from state and local income tax refunds and/or unemployment: forms 1099-G
- Taxable alimony received (Applicable to divorces finalized before January 1, 2019)
- Business or farming income — profit/loss statement, capital equipment information
- If you use your home for business — home size, office size, home expenses, office expenses.
- IRA/pension distributions — forms 1099-R
- Rental property income/expense — profit/loss statement, rental property suspended loss information
- Social Security benefits — forms SSA-1099
- Income from sales of property — original cost and cost of improvements, escrow closing statement, canceled debt information (form 1099-C)
- Other miscellaneous income — jury duty, gambling winnings, Medical Savings Account (MSA), scholarships, etc.

## Adjustments To Your Income

The following can help reduce the amount of your income that is taxed, which can increase your tax refund or lower the amount you owe.

- IRA contributions
- Student Loan Interest
- Health Savings Account (HSA) contributions
- Self-employed health insurance premium payments
- Alimony paid that is tax deductible (Applicable to divorces finalized before January 1, 2019)
- Educator expenses

(continued on page 3)



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**2023 Income Tax Brackets for  
 Single Filers, Married Couples Filing  
 Jointly,  
 and Heads of Household**

RATE	For Unmarried Individuals	For Married Individuals Filing Joint Returns	For Heads of Household
10%	\$0 to \$11,000	\$0 to \$22,000	\$0 to \$15,700
12%	\$11,000 to \$44,725	\$22,000 to \$89,450	\$15,700 to \$59,850
22%	\$44,725 to \$95,375	\$89,450 to \$190,750	\$59,850 to \$95,350
24%	\$95,375 to \$182,100	\$190,750 to \$364,200	\$95,350 to \$182,100
32%	\$182,100 to \$231,250	\$364,200 to \$462,500	\$182,100 to \$231,250
35%	\$231,250 to \$578,125	\$462,500 to \$693,750	\$231,250 to \$578,100
37%	\$578,125 or more	\$693,750 or more	\$578,100 or more

★ 2023 ★  
**E-FILING**  
 APPROXIMATE  
 DATE BEGINS  
**January 22, 2024**

FOR YOUR  
 CONVENIENCE  
 WE TAKE  
 VENMO  
 AND ZELLE

**2023 Capital Gains Tax Brackets**

	For Unmarried Individuals Taxable Income Over	For Married Individuals Filing Joint Returns Taxable Income Over	For Heads of Household
\$0	\$0	\$0	\$0
15%	\$44,625	\$89,250	\$59,750
20%	\$492,300	\$553,850	\$523,050
Source: Internal Revenue Service			

**2023 Standard Deduction**

Filing Status	Deduction Amount
Single	\$13,850
Married Filing Jointly	\$27,700
Head of Household	\$20,800
Source Internal Revenue	

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# 2023 Tax Appointment Worksheet (continued from page 1)

## Itemized Tax Deductions and Credits

The government offers a number of deductions and credits to help lower the tax burden on individuals, which means more money in your pocket. You'll need the following documentation to make sure you get all the deductions and credits you deserve.

- Child care costs—provider's name, address, tax id, and amount paid
- Education costs—forms 1098-T, education expenses
- Home mortgage interest and points you paid—Forms 1098
- Charitable donations—cash amounts and value of donated property, miles driven, and out-of-pocket expenses
- Other miscellaneous tax deductions—union dues, unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.) (for tax years prior to 2018 only for federal returns but your state might still allow it)
- Medical and dental expenses
- Energy credits

## Earned Income Tax Credit (EITC)

The maximum Earned Income Tax Credit (EITC) in 2023 for single and joint filers is \$560 if the filer has no children (Table 5). The maximum credit is \$3,995 for one child, \$6,604 for two children, and \$7,430 for three or more children.

## Child Tax Credit

The maximum Child Tax Credit is \$2,000 per qualifying child and is not adjusted for inflation. The refundable portion of the Child Tax Credit is adjusted for inflation and will increase from \$1,500 to \$1,600 for 2023.

## Taxes You've Paid

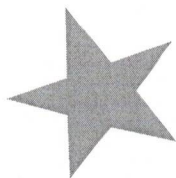
Properly documenting the taxes you've already paid can keep you from overpaying.

- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes—vehicle license fee based on value, if out of state.

## Other Information

- Estimated tax payments made during the year, prior year refund applied to current year, and any amount paid with an extension to file.
- Direct deposit information—routing and account numbers

★ *It is expected that the IRS will start accepting and processing tax returns for the upcoming 2024 tax season from Monday, January 22nd, 2024. The filing deadline for the regular tax season will be Monday, April 15th, 2024.* ★



**FOR MORE DETAILS  
PLEASE CHECK OUR  
NEW WEBSITE**  
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