

# TAX ORGANIZER 2023

when v	was the	last Year	We filed y	our tax			
Taxpayer/Primary Name			SSN		DO	В/	/
Spouse Name			SSN		DC	OB/	/
Address			Phone				
			e-mail				
Tax Payer Occupation			Spouse 0	Occupation	1		
**If you are a repeat clien  Single Married Filing Joint Dependent Name	**New N	y <b>Clients, pl</b> o Married Filin	last name, last name, last name, last case complet g Separately tead of House DOE	e <mark>ALL</mark> s hold	s of social & fill in ections.**  Relationship		hanges.**
	•					St	udent
	-	-	/	/		Yes	No
	-	-	/	/		Yes	No
	-	-	/	/		Yes	No
	-	_	/	/		Yes	No
For Direct Deposit and Dir Name of Bank	rect With	ndrawals	Routing #		A	account #	
DAYCARE		EIN	<b>\</b> #	I	ADDRESS	AMOU	NT PAID
• If you received Medica Did you claim unemple I/We certify that we have subsequently and the taxes were present If I/We are not completing the source documents back.	oyment omitted a pared bas	in 2023? (i all applicable sed on those	f yes, attack source docu	ments for submitte	t <b>ent.)</b> Fr our tax preparati d by us.	on for the	e tax year
Signature		Spouse Sig	gnature	_	Date		
FOR OFFICE USE ONLY							
OTHER REMARKS:							



### TAX ORGANIZER 2023

INPUT BY:	DATE:	CHECKED BY:
Business Name		EIN/SSN

### **Business Income and Expenses**

#### Exhibit A

RECEIPTS &	INVENTORY		REMARKS
	Gross Receipts	\$	
	Other Income	\$	
EXPENSES			
	1099 Issued	\$	
	Wages paid	\$	
	Advertising	\$	
	Car & Truck Expenses	\$	
	Commissions & Fees	\$	
	Contract Labor	\$	
	Development Costs	\$	
	Insurance	\$	
	Meals & Entertainment	\$	
	Loan Interest – Business Related	\$	
	Legal/Professional Fees	\$	
	Office Expense	\$	
	Postage & shipping	\$	
	Pension & Profit-Sharing Plan	\$	
	Rent/Lease	\$	
	Repairs & Maintenance	\$	
	Supplies	\$	
	Taxes & License	\$	
	Telephone	\$	
	Education & Training	\$	
	Travel	\$	
	Utilities	\$	
	Utilities	\$	
OTHER EXP	I .	1 '	1
ASSETS PUR	CHASES	1	· · · · · · · · · · · · · · · · · · ·
	Description	\$	
DATE OF PURCHASE			
	Opening Inventory	\$	
	Purchases	\$	
	Ending Inventory	\$	

(WE ARE ATTACHING PROOF OF INCOME & EXPENSES, BANK STATEMENTS, CREDIT CARD STATEMENTS, CASH RECEIPTS, CANCELLED CHECKS ETC)

George Goldstein Co., 1200 Bustleton Pike, Suite-2, Feasterville, PA. 19053. Tel (215) 745-2404, Fax. (215) 742-4142 e-mail: <a href="mailto:georgemcpa@gmail.Com">georgemcpa@gmail.Com</a>. <a href="mailto:www.georgegoldsteincpa.com">www.georgegoldsteincpa.com</a>



## TAX ORGANIZER 2023

		OR	
NAME	SSN		EIN
	Rental Prope	rties	
nibit B	•		
nedule - E / 8825			
operty Address			
	1	2	3
	1		3
op. Type: Single/Duplex/Condo			
ental Income			
rpense			
Advertisement			
Auto & Travel			
Cleaning & Maintenance			
Commission			
Insurance			
Professional Fee			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Utilities			
Commissions			
Other (Attach details)			
Association Dues			
License			
Trash Fees			
Grass Cutting			
Snow Removal			
0 + 60 111 0 0 1			
Cost of Building & Date of Purchas	e		
Improvements – Capital – Current Year			
Settlement sheet enclosed Y/N			

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