

2023

Taxpayer: _____ DOB: _____ Soc Sec #: _____ Occupation _____

Spouse: _____ DOB: _____ Soc Sec #: _____ Occupation _____

Current Address: _____

Filing Status Married: _____ Head of Household: _____ Single: _____ Email Address: _____

County of Residency Jan 1st, 2023: _____ Tele: Home: _____ Work: _____ Cell: _____

School District (Ohio) Jan 1st, 2023 _____

Children and Other Dependents (if not sure if you can claim do not hesitate to ask)

Name: _____ Relationship _____ DOB _____ Mo In Home _____ Soc Sec # _____ Dependent Income _____ How many yrs in college _____

<u>Interest Income – Earned</u>		<u>Dividend Income</u>		<u>Other Income</u>	
<u>From Whom</u>	<u>Amounts</u>	<u>From Whom</u>	<u>Amounts</u>	<u>From Whom</u>	<u>Amounts</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

To assist us in claiming all deductions and credits due you and in reporting all income items:

Please check the following questions if they apply to you and bring the supporting data.

Income Type

Amounts

Credits, Deductions & Info Con't

- ___ Tax Exempt Interest (Municipal)...
- ___ Social Security Benefits (Yours)...
- ___ Social Security Benefits (Spouse)...
- ___ Number of W-2s Self _____ Spouse _____
- ___ Baby sitting income
- ___ Unemployment Compensation...
- ___ Sell Stocks –Need Cost and Statements _____
- ___ Rentals – List Income / Include Expenses _____
- ___ Gambling Winnings / Prizes / Bring W2-G _____
- ___ Partnership / Sub S – Bring K-1.....
- ___ Estate / Trust ---Bring K-1.....
- ___ Withdrawal from IRA-TRA/ROTH (Circle) _____
- ___ Pay \$600 for rent or service in bus./ farm _____
- ___ Jury Duty / Odd Jobs.....
- ___ Ebay/ list sales 1099K _____

- ___ List Num. of Dep. In College: ___ Bring Form 1098-T and tuition stmts
- ___ Tuition Paid or Financed: _____ Amount
- ___ Are you legally blind? (H) ___ (W) ___
- ___ Sell Home-Bring Closing Statement for taxes paid
- ___ Pay over \$2,200 to household / in-home service
- ___ Pay / Receive Alimony / Periodic Payments
- ___ Own any worthless stock? _____
- ___ Buy goods or Magazines out of state\$ _____
- ___ Travel over 100 miles for Reserve Training
- ___ Start a new Business? Call us for details!
- ___ If a new client – Please bring last year’s return
- ___ Did you barter in 2023 or belong to barter group?
- ___ Buy special license plate (note if an IN College)
- ___ Schedule C filers list 12/31 Inventory
- ___ Rec. any notices from IRS /State **ALWAYS CALL US!**

Credits, Deductions & Information

- ___ Teachers / Aides class supplies.....
- ___ Pay rent (please see list on other side info)
- ___ 2023 IRA TRAD/ROTH (Circle) Contr (H) _____
- ___ 2023 IRA TRAD/ROTH (Circle) Contr (W) _____
- ___ Pay Child Care (please list on reverse side) _____
- ___ Adoption Expenses
- ___ Pay Long Term Care Ins. that qualifies for Indiana Partnership credit
- ___ HSA Contributions: Amount Paid After Tax _____

- ___ Please bring blank VOIDED check for E-File if new
- ___ List 12/31/2023 IRA Balance if over 72
IRA Balance (H) _____ (W) _____
- ___ List Incentive Stock Options (ISO) issued in 2023
- ___ Sales tax paid on Cars/Trucks/Boats
- ___ Moving Expenses for Armed Forces
- ___ Any demutualized insurance Co Stock sold / held
- ___ 529 Contributions by 12/31/2023 (bring statement)

Questions or Concerns:

Hartley Tax & Accounting, LLC
6066 East State Blvd
Fort Wayne, IN 46815

Telephone 260.749.0444
Secure Client Portal @
hartleytaxaccounting.securefilepro.com

Fax 260.749.4002
Tax checklists also online @
hartleytaxaccounting.com

2023

Itemized Deductions and Credits

Medical and Dental Expes (must exceed 7.5% of AGI) Amount

Medical Insurance Premium
Long Term Care Insurance Premium
Indiana Partnership Long Term Care Insurance.....
College and School Insurance Premium.....
Medicare Insurance Premium.....
Medicare Drug Coverage Insurance.....
Contact Lens/Vision Insurance
Prescription Drugs / Insulin.....
Eyeglasses and Repairs.....
Hearing Aids and batteries.....
Hospitals.....
Nursing Home Expenses.....

Lab and X-Ray Fees.....
Doctors / Dentists.....
Parking Fees and Lodging Expenses for Medical.....
Miles Driven for Medical Purposes miles

Taxes

Real Estate – Home
Condo or Lake Property Taxes.....
Personal Property and Boat Excise.....
Vehicle Excise Tax Veh 1 Veh 2 Veh 3 Veh 4
Excise Tax

Estimated State and Federal taxes you Paid by Check
Due Date 04/23 06/23 09/23 01/24
Federal
State

*Would you like 2024 vouchers and envelopes?
Yes No

Interest Paid to Others

Home Mortgage – (if paid to an individual List Name,
Address, and Social Security Number)

Mortgage Insurance Premium.....
Home Equity / 2nd Mortgage.....
Time Share / Lake Property.....
Investment Interest.....
Vehicle Interest / Schedule C Filers Only
Credit Card Interest / Schedule C Filers Only
Student Loan Interest (bring statements)
Points Paid On Home Refinance or Purchase

Credits and Other Deductibles

Day Care Business – List on Separate Sheet Please

Daycare Information (for Children through age 12)

(This Includes Sitter, Preschool and Maid Services)

Name Address Social Security Number or EIN (Required) Amount Paid

Contributions – Gift to Charity Amount

Church (must have acknowledgement)
College – (list University).....
Special License Plate (Note if IN College)..
Foreign Exchange Student ___X \$50 mo..
Other Charitable Contributions.....
Miles driven for charity miles
In Kind (household goods given to charity (if \$500 or more
must have acknowledgement from Charity and detailed list
of items in order to take) _____

FOR ALL MILEAGE DEDUCTIONS record ODOMETER READINGS AND
PURPOSE –

Business mileage rate is \$.655 Per Mile

Other Potential Items:

Bad Debt or Worthless Stock.....
Gambling Losses
Teaching Supplies (K – 12).....

If claiming a child that did not live with you, you must have
a signed Form 8332.

American Opportunity and Lifetime Learning

Credit Tuition Paid or Financed.....

Renters Deduction-Landlord Name, Address, Rent
(\$3000 Maximum allowed in Indiana)

Energy Credits/Deductions

Federal: Solar Energy Equip, Electric Cars, and Energy
efficient property. \$500 Lifetime Limit Credit

Standard Deduction: Single \$13,850 - HOH \$20,800 - Joint \$27,700 - Additional if over 65 \$3,000(M), \$1,850(S)

Please see other side