

2023 PERSONAL AND INCOME INFORMATION WORKSHEET

Must Be Filled In as Completely as Possible (Use Your 2022 Return as a Guide)

Your Name _____ Your Social Security Number _____
First MI Last

Spouse's Name _____ Spouse's Social Security No _____
First MI Last

Address: _____
Street City State Zip

TELEPHONE NUMBERS (please include area code) Home _____ Your Work _____ Spouse's Work _____

CELL PHONE NUMBERS (please include area code) Yours _____ Spouse's _____

OCCUPATIONS - Yourself _____ Your Spouse _____

DATE OF BIRTH - Yourself _____ Your Spouse _____ Email address: _____
MO DAY YEAR MO DAY YEAR

If entire family covered by health insurance all year check here. Did you own or spend any Virtual Currency in the calendar year?

At anytime throughout the year, did you have more than \$10,000 in a Foreign Bank Account?

DEPENDENT INFORMATION	Date of Birth	Social Security Number	Relationship	Months Lived in Your Home in 2023
Full Name _____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Do you want any refunds due you directly deposited to your checking or savings account? Yes No If yes, is the information provided last year still accurate? Yes No (If no, we need current routing number and account number)
(Please Bring all W-2s, Forms 1099 and Other Documents Indicating Income Received)

1. Total WAGES earned: (optional - we will add this up for you) \$ _____ 2. TIPS RECEIVED but not reported to your employer: \$ _____

3. INTEREST INCOME: (Please bring Forms 1099 or Year End Statements)

If you received interest income from a seller financed mortgage in 2023, bring name, address & social security number of payer—this is an IRS requirement.

Payer's Name	Amount	Payer's Name	Amount
_____	_____	_____	_____
_____	_____	_____	_____

4. DIVIDEND INCOME: (Please bring Forms 1099 or Year End Brokerage Statements)

Payer's Name	Gross Dividends	Payer's Name	Gross Dividends
_____	_____	_____	_____
_____	_____	_____	_____

5. ALIMONY RECEIVED: \$ _____ ALIMONY PAID: \$ _____ - SSN of Person the Alimony was Paid to - _____

6. UNEMPLOYMENT COMPENSATION RECEIVED: \$ _____

7. SOCIAL SECURITY PAYMENTS received: Yourself \$ _____ Your Spouse \$ _____

8. If you SOLD stocks, real estate or other assets in 2023, bring all pertinent papers. If you had STOCK TRANSACTIONS, please bring brokerage buy and sell slips or a detailed listing. **We need to know when you bought the stock and how much you paid for the stock!**

9. MISCELLANEOUS INCOME not shown elsewhere - SOURCE: _____ Amount: \$ _____

10. I have an TRADITIONAL IRA or a ROTH IRA. How much paid in 2023? \$ _____ How much paid in 2024 for 2023? \$ _____

11. If you PURCHASED REAL ESTATE in 2023, bring ALL escrow papers.

12. ESTIMATED TAX PAYMENTS FOR 2023 (DO NOT INCLUDE WITHHOLDING FROM W-2s or BALANCE paid from the previous return)

FEDERAL				CALIFORNIA			
Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
1. _____	\$ _____	2. _____	\$ _____	1. _____	\$ _____	2. _____	\$ _____
3. _____	\$ _____	4. _____	\$ _____	3. _____	\$ _____	4. _____	\$ _____

**(Over for Deductions Information Worksheet) -- IF YOU ARE A NEW CLIENT,
PLEASE BRING COPIES OF YOUR 2022 FEDERAL AND CALIFORNIA RETURNS**