KIRCHNER & JORDAN, CPAs
427 W. SINTO AVE., STE. 200
SPOKANE, WA 99201-2465

Dear Client:

We hope this mailing finds you and yours well and that 2023 was a good year for you and your family.

Our appointment availability is limited, so we encourage you to drop off, mail in, or digitally send your information to us as soon as you have your forms available. The enclosed 2023 Tax Organizer will assist you in gathering information necessary for us to prepare your 2023 income tax return. Please complete the organizer and questionnaire enclosed and provide supporting documentation where necessary. Prior year data is included on the organizer to assist you. **Please include the completed organizer with your other paperwork.**

Please provide us with the following additional information:
*Tax forms related to income: W-2, 1099-INT, 1099-DIV, K-1, etc. If you have brokerage accounts, please include ALL pages in your brokerage statement.
*Itemized deduction documentation: 1098-INT (mortgage interest), property tax forms, charitable donation receipts, and non-cash donation receipts (Goodwill, etc.)
*Form(s) 1095 (health insurance coverage)
*Closing statements pertaining to ANY real estate transactions
*All other supporting documents (schedules, checkbooks, etc.)
*Any tax notices received from the IRS or other taxing authorities during the year

We will once again be collecting donations for the Second Harvest Food Bank. Any non-perishable items that you choose to donate will help a family in our community and will be greatly appreciated.

We encourage you to check out our client portal, Canopy. You can upload documents, sign electronically, pay your invoice, and access copies of prior year tax returns and tax documents. Canopy also gives us the ability to send you to-do lists for missing items needed to complete your tax return. We encourage you to download the Canopy app to your smart phone as well.

As a reminder, once your tax return is completed and processed by our front office team, there are a few key steps that need to take place before your return can be filed with the IRS:

1) Client (& Spouse if married) must sign IRS Form 8879 IRS E-File Authorization
2) Client (& Spouse if married) must sign our firm engagement letter for filing year 2023
3) Invoice to our office for services rendered must be paid

As our technology has progressed, these steps are becoming even easier and can be accomplished with a few clicks at your computer or smart phone. If you need assistance, or would like to sign your signature documents electronically, please contact the front office upon completion. Your invoice can be paid in the client portal, via the Intuit invoice email, or online at https://www.kirchnerjordancpa.com/pay-invoice. We'll continue to take paper checks, and cash for those who pick up in person.

We are honored to be able to provide service to you and thank you for your continuing trust and confidence in us. Please contact us if you need further assistance.

Sincerely,

Kirchner & Jordan CPA

2023	1040	US	Client Information	1

Kirchner & Jordan CPA
427 W Sinto Ave Ste 200
Spokane, WA 99201
Telephone number: (509) 328-8844
Fax number: (509) 325-9345
E-mail address: kim@kirchnerjordancpa.com

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)	1
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying surviving spouse (2021 or 2022)	
Taxpayer	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Spouse	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying surviving spouse (QSS)

2023	1040	US	Client Information (continued)	1 p2

Please add, change or delete information for 2023.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	1
	Mobile phone	
	Fax number	
	E-mail address	
Spouse Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	
	Mobile phone	
	Fax number	
	E-mail address	
Taxpayer Authentication	Driver's license no.	
	Driver's license state	
	Issue date (m/d/y)	
	Expiration date (m/d/y)	
	Theft protection PIN	
Spouse Authentication	Driver's license no.	
	Driver's license state	
	Issue date (m/d/y)	
	Expiration date (m/d/y)	
	Theft protection PIN	

Daytime Phone

1 = Work
2 = Home
3 = Mobile

2023	1040	US	Dependents	2

Please add, change or delete information for 2023.

DEPENDENTS

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death		
Date of adoption		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
IRS theft protection PIN		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death		
Date of adoption		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
IRS theft protection PIN		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death		
Date of adoption		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
IRS theft protection PIN		

Type of Dependent

1 = Child living w/taxpayer
2 = Child not living w/taxpayer
3 = Dependent other than child
4 = Head of household or qualifying surviving spouse (QSS) only. not a dependent
5 = Earned income credit only, not a dependent

Earned Income Credit

1 = When applicable (default)
2 = Student age 19 to 23
3 = Disabled
4 = Force
5 = Suppress

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the U.S. This proof is typically in the form of:

1. School records or statement
2. Landlord or property management statement
3. Health care provider statement
4. Medical records
5. Child care provider records
6. Placement agency statement
7. Social service records or statement
8. Place of worship statement
9. Indian tribe office statement
10. Employer statement

NOTE: If your child is disabled, please provide one of the following forms of proof of disability:

1. Doctor statement
2. Other health care provider statement
3. Social services agency or program statement

2023	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2023?
☐	☐	What is the primary email address used by the household? We want to make sure that our client portal and app is set up under this email.____________________
☐	☐	When your return is complete, we will upload a digital file to the client portal. Would you like a paper copy in addition to the digital copy? (Please circle one.) Yes, paper copy No, digital copy only
☐	☐	Would you like to receive a text message when your tax return is finished?

DEPENDENTS

Yes	No	
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2023?

HEALTH CARE COVERAGE

Yes	No	
☐	☐	Did you purchase health insurance through your state Health Care Exchange? If yes, please provide your Form 1095-A from the state insurance exchange. We need this form to prepare your income tax return and the IRS will not accept submission without it.

INCOME

Yes	No	
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you receive any disability income?

PURCHASES, SALES AND DEBT

Yes	No	
☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2023?

Miscellaneous Questions

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? (If yes, please provide a copy of the closing statement with your tax records.)

☐ ☐ Do you have a mileage log for all of the miles you want to take as a deduction?

☐ ☐ Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐ ☐ Did you have any debts canceled or forgiven?

RETIREMENT PLANS

☐ ☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐ ☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?

EDUCATION

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐ ☐ Did you, your spouse, or a dependent, attend a college, university, or vocational school, and incur any tuition expenses? If yes, please provide us the form 1098-T issued by the educational institution.

ITEMIZED DEDUCTIONS

☐ ☐ Do you have mortgage debt in excess of $750,000 on your personal (and secondary) home?

☐ ☐ Do you have receipts for all of the charitable contributions you want to take as a deduction?

ESTIMATED TAXES

☐ ☐ Did you make any estimated payments to the IRS for your 2023 taxes? If yes, please provide the amount paid each quarter. It is important to keep copies of these payments.
April 15 (Q1) _____ June 15 (Q2) _____ September 15 (Q3) _____
January 15 (Q4) _____

2023	1040	US	Miscellaneous Questions

☐ ☐ If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2024 taxable income and withholdings to be different from 2023?

MISCELLANEOUS

☐ ☐ Do you want to allocate $3 to the Presidential Election Campaign Fund?

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account in excess of $10,000 USD?

☐ ☐ Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

☐ ☐ Was your home rented out or used for business?

☐ ☐ Did you receive any accelerated death benefits from a life insurance policy?

☐ ☐ Did you have a health savings account (HSA) or a medical savings account (MSA)?

☐ ☐ Have you been the victim of identity theft? Has the IRS issued an identity theft PIN number to you?

☐ ☐ Did you engage the services of any household employees?

☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

☐ ☐ Did you or your spouse make any gifts to an individual that total more than $17,000, or any gifts to a trust?

☐ ☐ Did your bank account information change within the last twelve months?

☐ ☐ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency?

☐ ☐ Do you have a personal estate worth more than $2.193 million? If so, would you like to schedule a time to review your estate planning options?