2023 TAX YEAR

Taxpayer Full Name (and Spouse)

1. In order to comply with Federal law, we are required to provide you a consent form in order to disclose **any** tax return information to third parties. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. In other words, if you would like information from your tax return to be forwarded to your mortgage broker or your adult child, please contact our office so we may send you a consent form to be signed. We can always send you a digital copy of the tax return (in an encrypted, secure email) so you may send a copy to the third party at your convenience.

2. Our firm uses a Portal platform called ShareSafe to send and receive the files securely. We still have the option for you to send us digital information securely on our website **homepage** at www.milamcpa.tax. If you do not want a designated Portal created for you, we can send you secured digital documents via our email ShareSafe feature. ShareSafe requires dual authentication which means we must have an accurate primary email and phone number on file (see below #4).

3. We use AccuSign to sign and date e-file authorizations or other documents requiring signature(s) in a safe, digital way if you do not want to come to office and physically sign the documents. By using your smartphone, tablet or desktop mouse you can sign your documents rather than printing, signing, scanning, and returning. You will receive an email from AccuSign notifying you documents are pending if you choose this signature method. If married, we will need **separate** emails for both taxpayer and spouse. *AccuSign will not use the same email for two signing parties.*

   Please check the box to indicate if you prefer to sign digitally via AccuSign. ☐

4. Please select **one** from the following ways to receive your completed tax return(s):

☐ I would like to receive a bound copy of my completed 2023 tax return ONLY (nothing digital/no PDF).

☐ I would like to receive a bound copy of my tax return AND send my encrypted 2023 tax returns via email. **Please provide your email address below.**

☐ I would like to receive my encrypted, secure 2023 tax return in digital format ONLY. *Please provide your email address below.**

	EMAIL	Type: Cell / Work / Home PHONE	Check one box for primary Portal Admin
TAXPAYER			Cell ☐
SPOUSE			Cell ☐

No Portal setup, please. For secure digital documents, send to me via SecureSafe ☐

2024TY ORGANIZER ☐ MAIL ☐ EMAIL ☐ NONE/DISCONTINUE

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The following questions pertain to the 2023 tax year.
For any question answered Yes, include supporting detail or documents.

PERSONAL INFORMATION	Yes	No
Did your marital status change?	☐	☐
Are you married?	☐	☐
If Yes, do you and your spouse want to file separate returns?	☐	☐
If No, are you in a domestic partnership, civil union, or other state-defined relationship?	☐	☐
Can you or your spouse be claimed as a dependent by another taxpayer?	☐	☐
Did you or your spouse serve in the military or were you or your spouse on active duty?	☐	☐

DEPENDENTS	Yes	No
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support.	☐	☐
Did you or your spouse pay for child care while you or your spouse worked or looked for work?	☐	☐
Do you have any children under age 18 with unearned income more than $1,250?	☐	☐
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,250?	☐	☐
Did you adopt a child or begin adoption proceedings?	☐	☐
Are any of your dependents non-U.S. citizens or non-U.S. residents?	☐	☐
Are any of your dependents required to file a tax return?	☐	☐

EDUCATION	Yes	No
Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition?	☐	☐
Did you or your spouse pay any student loan interest?	☐	☐
Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?	☐	☐
Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan?	☐	☐
If Yes, include all Forms 1099-Q.		
If Yes, were the amounts withdrawn used for qualified tuition expenses?	☐	☐

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PERSONAL RESIDENCE

	Yes	No
Did your address change?	☐	☐
If Yes, provide the new address. ______________________________		
If Yes, did you move to a different home because of a change in the location of your job?	☐	☐
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	☐	☐
Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?	☐	☐
Are your total mortgages on your first and/or second residence greater than $750,000?	☐	☐
If Yes, provide the principal balance and interest rate at the beginning and end of the year. ______________ ______________		
Did you or your spouse take out a home equity loan?	☐	☐
Did you or your spouse have an outstanding home equity loan at the end of the year?	☐	☐
If Yes, provide the principal balance and interest rate at the beginning and end of the year. ______________ ______________		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?	☐	☐
Did you or your mortgagee receive mortgage assistance payments?	☐	☐
If Yes, include all Forms 1098-MA.		

SALE OF YOUR HOME

	Yes	No
Did you sell your home?	☐	☐
Did you receive Form 1099-S? If Yes, include Form 1099-S	☐	☐
Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?	☐	☐
Did you or your spouse ever rent out the property?	☐	☐
Did you or your spouse ever use any portion of the home for business purposes?	☐	☐
Have you or your spouse sold a principal residence within the last two years?	☐	☐

At the time of the sale, the residence was owned by the: ☐ Taxpayer ☐ Spouse ☐ Both

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DEDUCTIONS AND CREDITS

	Yes	No
Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?	☐	☐
If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.		
Did you or your spouse incur any casualty or theft losses?	☐	☐
Did you or your spouse make any large purchases, such as motor vehicles and boats?	☐	☐
Did you or your spouse incur any casualty or loss attributable to a federally declared disaster?	☐	☐
Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?	☐	☐
Did you or your spouse use gasoline or special fuels for business or farm purposes (other than for a highway vehicle)?	☐	☐
If Yes, provide the number of gallons or special fuels used for off-highway business purposes. ________ Gallons ________ Type		
Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?	☐	☐
Did you or your spouse install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?	☐	☐

FOREIGN MATTERS

	Yes	No
Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?	☐	☐
Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?	☐	☐
Did you or your spouse create or transfer money or property to a foreign trust?	☐	☐
Did you or your spouse own any foreign financial assets?	☐	☐
Were you or your spouse subject to the transition tax on undistributed foreign income and elect to pay the tax in installments?	☐	☐
Did you or your spouse have an interest in an S corporation that had undistributed foreign income subject to the transition tax?	☐	☐
If Yes, did the corporation cease to be an S corporation?	☐	☐
If Yes, was there a sale or liquidation of substantially all of the corporation's assets or did the corporation cease business?	☐	☐
If Yes, did you or your spouse transfer any share of stock in the corporation?	☐	☐

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RETIREMENT OR SEVERANCE

	Yes	No
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?	☐	☐
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?	☐	☐
Did you or your spouse turn age 73 and have money in an IRA or other retirement account without taking any distribution?	☐	☐
Did you or your spouse make a qualified charitable distribution directly from an IRA?	☐	☐
Did you or your spouse retire or change jobs?	☐	☐
Did you or your spouse receive deferred, retirement or severance compensation?	☐	☐

If Yes, enter the date received (Mo/Da/Yr). ____________

GIFTS

	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of $17,000 to any individual?	☐	☐
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?	☐	☐
Did you or your spouse make any gifts to a trust for any amount?	☐	☐
Did you or your spouse have a life insurance trust?	☐	☐
Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?	☐	☐
Did you or your spouse forgive any indebtedness to any individual, trust or entity?		

INVESTMENTS

	Yes	No
Did you or your spouse have any debts canceled, forgiven or refinanced?	☐	☐
Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?	☐	☐
Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?	☐	☐
Did you or your spouse sell, exchange, or purchase any real estate? If Yes, include closing statements.	☐	☐
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?	☐	☐
Did you or your spouse engage in any put or call transactions? If Yes, provide the transaction details.	☐	☐
Did you or your spouse close any open short sales?	☐	☐
Did you or your spouse sell any securities not reported on Form 1099-B?	☐	☐

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HEALTHCARE

	Yes	No
Did you obtain healthcare coverage through the Marketplace?	☐	☐
If Yes, include all Forms 1095-A.		
If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment?	☐	☐
Did you, your spouse, or a dependent have healthcare purchased through the Marketplace and for whom you did not receive Form 1095-A?	☐	☐
Did you receive Form 1095-A for someone claimed as a dependent on another taxpayer's return or who is filing their own return and is not claimed on another taxpayer's return?	☐	☐
Was anyone covered on your health insurance policy also covered on another health insurance policy for any part of the year?	☐	☐
Were you eligible for employer-sponsored healthcare coverage?	☐	☐
Did you or your spouse have any transactions pertaining to a health savings account (HSA)?	☐	☐
If you received a distribution from an HSA, include all Forms 1099-SA.		
Did you or your spouse have any transactions pertaining to a medical savings account (MSA)?	☐	☐
If you received a distribution from an MSA, include all Forms 1099-SA.		
Did you or your spouse receive any distributions from long-term care insurance contracts?	☐	☐
If Yes, include Forms 1099-LTC.		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job?	☐	☐
If Yes, how many months were you covered? ________		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job?	☐	☐
If Yes, how many months were you covered? ________		

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MISCELLANEOUS

	Yes	No
Did you or your spouse pay in excess of $1,000 in any quarter or $2,600 during the year for domestic services performed in or around your home to individuals who could be considered household employees?	☐	☐
Did you or your spouse receive unreported tip income of $20 or more in any month?	☐	☐
Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness?	☐	☐
Did you or your spouse engage in any bartering transactions?	☐	☐
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	☐	☐
For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?	☐	☐
In 2023, did you or your spouse: (a) receive (as a reward, award, or compensation); (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐	☐
In 2023, did you or your spouse receive Payroll Protection Program loan forgiveness or are you or your spouse seeking forgiveness?	☐	☐

If No, enter the date loan forgiveness was denied or that you or your spouse decided not to seek forgiveness. Date (Mo/Da/Yr) ____________

If No, enter the amount of the loan for which forgiveness was denied or the amount of the loan for which you or your spouse decided not to seek forgiveness.

Amount __________________

	Yes	No
Do you own an interest in an LLC or similar entity that has a reporting obligation under the Corporate Transparency Act?	☐	☐

Additional state pates have been included at the back of the organizer and should be reviewed.

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