

Downtown  
110 E Waterman Ste 100

West  
841 N Tyler Ste 700



(316) 803-1040  
www.markettaxservices.com

Secure Portal  
markettaxservices.taxdome.com

For basic information, only complete any sections that have changed in 2023. (OFFICE USE) Intake by: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer First Name M.I. Last Name (Required)		Occupation	SSN
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Phone	Email (Required for portal signature)	Date of Birth
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Driver's License/State ID No.	State	Issue Date	Exp. Date	IRS IP PIN (if applicable)
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Spouse First Name M.I. Last Name (Required)		Occupation	SSN
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Secondary Phone	Email (Required for portal signature)	Date of Birth
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Driver's License/State ID No.	State	Issue Date	Exp. Date	IRS IP PIN (if applicable)
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If you moved during 2023, please provide your new address:	Date of move
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Street Address	Apt	City	State	Zip
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Marital status at 12/31/23: Single Married Separated Widow(er) Married Filing Separately Unsure  
 Were you divorced or separated during the year? Yes No

Full name of dependent(s) Provide SS card(s) if new dependent	Social Security #	IP PIN	Date of birth	Months lived in home	Relationship to taxpayer	College student?	Income

Did any of the children have unearned income above \$1,100 for the year? Yes No  
 Do any of the children have a disability? Yes No  
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Bank Info - To be used for (please circle all that apply)	Direct deposit of refund		Direct debit of balance due		Return preparation fees
			Debit date:		
Name of Bank	Checking	Savings	Routing number	Account number	

Preferred method of delivery for completed return (please circle)

Scheduled in person signing appointment Drop off signing (no appointment) Secure online portal signing (email address required)

### Tax Preparation Checklist (for office use only)

W-2	1099-G
1099-INT	1099-C/1099-A
1099-DIV	1099-NEC
1099-B	1099-MISC
1099-R	Schedule K-1
SSA-1099	1099-S/1099-SA
W-2G	1099-K
Business Income/Expenses or Financial Statements	Rental Income/Expenses
Farm Income/Expenses	Mileage logs

Do you have income from any sources other than items listed above? Yes No

Please complete the rest of this organizer. Please review the "Taxpayer Responsibilities" section carefully and sign on the first set of signature lines. If you have any questions, please speak to your tax preparer.

## Itemized Deductions Worksheet

<b>Medical Expenses.</b> Must exceed 7.5% of income to be a benefit — include cost for dependents — do not include any expenses that were reimbursed by insurance.				<b>Charitable Contributions.</b> If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.			
Dentists	\$	Hospitals	\$	Cash	\$		
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.			\$
Equipment	\$	Prescriptions	\$	Did you transfer funds from an IRA directly to a charity? Yes			\$
Eyeglasses	\$	Other	\$	No			\$
Medical miles: _____ @ 22¢				Charitable mileage @ 14¢			
<b>Taxes Paid.</b> Do not include taxes paid for full or partial business or rental-use property, including business use of the home.				<b>Interest Paid.</b> Do not include interest paid for full or partial business or rental-use property, including business use of the home.			
State estimated taxes — paid in 2023			\$	Main Home	\$	Equity loan	\$
Real estate tax — residence			\$				
Real estate tax — other			\$	Second home	\$	Equity loan	\$
Personal property taxes			\$				
Property tax refund — received in 2023			\$	Points	\$	Investment interest	\$
Foreign tax paid			\$				
Gambling losses ( <i>Deductible only up to the amount of winnings. A log must be kept to verify losses</i> )			\$	Did you pay a mortgage insurance premium when you purchased your home?			

## Adjustments Worksheet

<b>Educator expenses.</b> Classroom expenses of teachers, counselors, and principals. Maximum \$300 each.	\$
<b>Self-employed health insurance deduction</b>	\$
<b>IRA deduction.</b> For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2023 may be made in 2024.	\$
<b>Student loan interest deduction.</b> Paid for taxpayers and dependents. Income limits apply.	\$
<b>Other adjustments.</b> Include description.	\$

## Estimated Tax Payments — Tax Year 2023

Installment	Date paid	Federal	Date paid	State
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2022 overpayment?		\$		\$
Total		\$		\$

## Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.
- **You acknowledge that you are responsible for paying any outstanding tax liability by April 15, 2024 (regardless of an extension) or you may be subject to penalties and/or interest.**

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

(To be completed at return signing) Please sign to acknowledge you have received all original documents you provided

Taxpayer

Spouse

Date

# Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?								
	Yes	No	Did you pay or receive alimony in 2023? <i>Paid      Received      \$</i>	<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>						
	Yes	No	<b>Did you purchase health insurance through a public exchange, such as the Healthcare Marketplace?</b>								
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?								
	Yes	No	Did you pay anyone for domestic services in your home?								
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?								
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?								
	Yes	No	Are you a member of the military?	State of residency							
	Yes	No	Were you a citizen of or lived in a foreign country?	Foreign country							
	Yes	No	<b>Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$10K</b> Yes    No								
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2023? <i>(Provide Social Security card and Dependent Section on page 1)</i>								
	Yes	No	Were any children attending college?	<i>Year in college</i>	<table border="1"> <tr> <td>Paid by you: Tuition \$</td> <td>Student loan interest \$</td> <td>Books \$</td> </tr> <tr> <td>Paid by student: Tuition \$</td> <td>Student loan interest \$</td> <td>Books \$</td> </tr> </table>	Paid by you: Tuition \$	Student loan interest \$	Books \$	Paid by student: Tuition \$	Student loan interest \$	Books \$
	Paid by you: Tuition \$	Student loan interest \$	Books \$								
	Paid by student: Tuition \$	Student loan interest \$	Books \$								
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?								
			<i>Student</i>	<i>Amount paid \$</i>							
			<i>Name and address of school</i>								
	Yes	No	Did you pay for child or dependent care so you could work or go to school? <i>(add statement if needed)</i>								
			<i>Name of provider</i>	<i>EIN or SSN</i>							
			<i>Address</i>	<i>Amount paid \$</i>							
Yes	No	Did you make any contributions to a 529 plan in 2023?		<i>Amount paid \$</i>							
Yes	No	Did you, or do you plan to, contribute money before April 15, 2024 to an IRA for 2023?		Traditional IRA    Roth IRA							
INVESTMENTS	Yes	No	Did you roll over any amounts from a retirement account in 2023?								
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?								
	Yes	No	Did you receive any income from an installment sale?								
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2023?								
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2023?								
	Yes	No	<b>Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency/digital assets?</b>								
	Yes	No	Did you, or do you plan to, contribute money before April 15, 2024 to an HSA for 2023? If yes, provide details.								
DEDUCTIONS	Yes	No	<b>Did you use all funds from an HSA to pay for qualified medical expenses?</b>								
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.								
	Yes	No	Did you pay sales taxes on a major purchase in 2023, such as a vehicle, boat, or home?								
	Yes	No	Did you make any charitable contributions in 2023? If yes, provide details.								
	Yes	No	Did you work from a home office or use your car for business? If yes, provide details and/or mileage logs.								
BUSINESS	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?								
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?								
	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.								
HOME	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.								
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.								
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?								
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.								
<b>State info</b>		Full year resident	Part-year resident	Nonresident	School district						
States of residence during 2023 and dates				Do you rent or own your home?	Rent    Own						

Other notes for your preparer:

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