

Thank you for taking the time to review and complete our 2023 Tax Organizer. As a licensed CPA firm serving our clients for over 40 years, we appreciate your business and strive to do the best for you.

This organizer is an essential part of the tax return process. Tax rules are constantly changing so this information helps us keep up to date with your individual situation. Please take the time to complete it as accurately as possible.

If you are a new client, please feel free to call our office at 513-821-8768 for a quote or if you have any questions. Our fees are competitive; we are open year-round & can complete your return on a 'drop off' or appointment basis.

We also offer additional services such as accounting and payroll.

We look forward to serving you!

TAXPAYER INFORMATION		SPOUSE INFORMATION	
First Name	Initial	First Name	Initial
Last Name		Last Name	
SSN	D.O.B.	SSN	D.O.B.
Occupation		Occupation	
Home	Cell	Home	Cell
Email		Email	
Address			

FILING STATUS	
<input type="checkbox"/> Single	<input type="checkbox"/> Head of Household
<input type="checkbox"/> Married	<input type="checkbox"/> Married Filing Separate

REFUND		
Automatic Deposit?	Yes (attach a VOID Check)	No

DEPENDENTS	
Name	
D.O.B.	SSN
Relationship	Months Lived at Home
Name	
D.O.B.	SSN
Relationship	Month Lived at Home

	FEDERAL		STATE	
	Date Paid	Amount	Date Paid	Amount
Overpayment				
1st Quarter				
2nd Quarter				
3rd Quarter				
4th Quarter				

SALARIES & WAGES - <i>Attach all W-2 forms</i>		
W-2	Name of Employer	Gross Wages
1		
2		
3		
4		

**Referred By:**

**Name:**

**Phone:**