

TAX ORGANIZER 2023 ~ Name

[Updated 12/20/23 8:41 AM]

Changes from Last Year

Questions/Comments

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INCOME

EARNINGS

NAME	AMOUNT
	See W-2

INTEREST INCOME [from Banks & Financial Institutions - Attach 1099 Int]

NAME	AMOUNT
Bank	\$
Bank	\$

INVESTMENTS

Dividends	\$0	Attached 1099Div's
Capital Gains Distributions	\$0	Attached 1099B's
Nontaxable Distributions	\$0	Attached 1099B's

OTHER INCOME [Attach W-2 G's]

Prizes & Awards	\$
Schedule E – Book Royalties	\$

DEDUCTIONS

MEDICAL

EXPENSES – PRESCRIPTION MEDICATIONS	\$
Pharmacy	\$
Pharmacy	\$

EXPENSES – MEDICAL PROFESSIONAL FEES	\$
Dr. Dental	\$
Dr. Apple	\$
Dr. Avocado	\$
My Medical Clinic	\$
Tucson Acupncture	\$

EXPENSES - MEDICAL SUPPLIES & EQUIPMENT	\$
DME [CPAP] Supplies & Equipment	\$
Eyeglasses	\$

EXPENSES - MEDICAL INSURANCE	\$
Medicare -	\$
Seupplement	\$

MEDICAL TRAVEL	\$
Transportation. (see miles below)	miles
Lodging	\$
Travel Expenses	\$

MISCELLANEOUS

CAPTIAL LOSSES	\$
IRA	\$
Taxable accounts?	\$

EXPENSES - PROFESSIONAL DEVELOPMENT	\$ 0
	\$

EXPENSES - TAXES & FEES	\$
Auto Registration - AZ	\$
Auto Sales Tax	\$
Sales Taxes (major purchases)	\$
TAX PREP	\$

DONATIONS

CASH CONTRIBUTIONS	\$
	\$
	\$
	\$

NON-CASH DONATIONS (Keep under \$600 to avoid audit)	\$
Interfaith Council - food donations	pounds

TAX CREDITS - DONATIONS	AZDOR.GOV/TAX-CREDITS		\$
FORM	LIMIT	WHERE	AMOUNT PAID
Form 352 - Foster Care <i>QFC010020</i>	\$ 500	Gap Ministries	\$
Form 321 - Charitable Org <i>QC020124</i>	\$ 400	Interfaith Community Services	\$
Form 322 - School	\$ 100	School	\$

TOTAL MILEAGE - Odometer Jan 1 = 69,195 Dec 31 =

VOLUNTEER MILES			
<i>WHERE</i>	<i>1 - MILES Round TRIP X</i>	<i>2 - # OF TRIPS =</i>	<i>TOTAL MILES [1x2]</i>
Red Cross - donate blood	19	2	miles

MEDICAL MILES			
<i>WHERE</i>	<i>1 - MILES Round TRIP X</i>	<i>2 - # OF TRIPS =</i>	<i>TOTAL MILES [1x2]</i>
ACP - Lab	19.6		miles
			miles
			66 miles
			miles
			miles
			miles
			miles
			88 miles

REAL ESTATE

PRIMARY RESIDENCE

Address (Built 2001). (see attached disclosures for BH)

- Pima County Tax Code =
- Description = Continental Ranch Sunflower Phase V Lot
- Bought
- Carry over solar credits from 2021

Insurance	\$
Mortgage Interest	\$
Pima County Property Taxes. 2023	\$