1212 Haywood Road, Bldg. 100 Greenville, SC 29615



## **2023 INCOME TAX SCHEDULE**

*Instructions:* This form is designed to be a useful tool for you to gather information for us to prepare your returns. It is not all inclusive, so please attach any additional information. You do not have to use this entire form, but at a minimum, please complete the GENERAL INFORMATION section below. Also, include <u>all</u> tax documents such as W-2s; 1099s; Social Security form SSA-1099; health insurance form 1095-A, etc. Please include ALL pages from a broker's annual tax reporting 1099 package. <u>PLEASE NOTE—certain 2023 Form 1099s from banks and brokers are not required to be mailed until Feb 15, 2024.</u>

		<u>Taxpayer</u>			<u>Spouse</u>	
Name						
Soc Sec #						
Occupation						
Birth date						
Address						
Telephone	Work		Home		Cell	
Email address						
<u>Dependents:</u> <u>Full N</u>	lame	Birth Date	<u>Soc Sec #</u>	<u>Relationship</u>	# Months <u>in Home</u>	Income
				·		
				·		
Please note: We	e may need to	contact you for add substantiate certai	litional informat	ion. As your tax p	reparer, we are re	quired by the IRS to
					2	or (CCH) that your re-
		re is an additional ch				(CCII) that your re
Please		CT DEPOSIT ( ided check (or a c				
Direct depose Draft balance	it of refund(s)	NONO	YES YES If Y	<b>ES</b> date to draft ba	nk account	
Dian Suland		· · · · ·		Lo, auto to arait ou	in account	
		Gene	ral Questions a			
NEC				nd Certification	· 1 · · · · · · · · · · · · · · · · · ·	
		want \$3 to go to the	e Presidential Elec	nd Certification	•	our tax or refund)
YES YES	NO At any (b) sell,	want \$3 to go to the	e Presidential Elec d you: (a) receive therwise dispose	nd Certification tion Campaign. (The (as a reward, award	l, or payment for pro	our tax or refund) operty or services); or
	NO At any (b) sell, (for exa	want \$3 to go to the time during 2023, di exchange, gift, or o ample—Bitcoin, Lite	e Presidential Elec d you: (a) receive therwise dispose ecoin)?	nd Certification ation Campaign. (The (as a reward, award of a digital asset (or	, or payment for pro a financial interest	our tax or refund) operty or services); or
YES YES	NO At any (b) sell, (for exa NO I author	want \$3 to go to the time during 2023, di exchange, gift, or o ample—Bitcoin, Lite	e Presidential Elec d you: (a) receive therwise dispose ecoin)? rities to discuss m	nd Certification etion Campaign. (The c (as a reward, award of a digital asset (or any returns, attachmer	l, or payment for pr a financial interest	our tax or refund) operty or services); or in a digital asset) ters with the Preparer.
YES	NO At any (b) sell, (for exa NO I author	want \$3 to go to the time during 2023, di exchange, gift, or o imple—Bitcoin, Lite rize the taxing autho	e Presidential Elec d you: (a) receive therwise dispose ecoin)? rities to discuss m	nd Certification etion Campaign. (The c (as a reward, award of a digital asset (or any returns, attachmer	l, or payment for pr a financial interest	our tax or refund) operty or services); or in a digital asset) ters with the Preparer.

	<u>Medical expenses</u> (Include ONLY out-of-pocket and af	tor-tax amounts)	Mortgage interest	
		α - cax amounts <i>j</i>	Paid to Bank (Attach forms 1098)	\$
	Prescription Drugs	\$	Paid to an <b>individual</b> :	Φ
	Medicare premiums (Form 1099-SSA)		Soc Sec #	
$\mathbf{S}$	Medical/dental insurance premiums	\$	Name	\$
N	Long-term care insurance: Taxpayer	\$	Address	Φ
ITEMIZED DEDUCTIONS	Spouse	\$	<u>Charitable contributions</u>	
I	Long-term care expenses	\$	Cash, checks, credit cards:	
$\mathbf{C}$	Doctors, dentists, etc.	\$	Cash, checks, creun carus.	¢
	Hospitals	\$		_\$
	Lab fees	\$	Mileage: Jan-Dec 2023n	 piles
Ο	Eyeglasses and contacts	\$	Milleage. Jail-Dec 2025	lilles
	Other:	¢	Non-cash contributions:	
B		\$	NOTE: Donated items <u>must</u> be of "good	od" or better quality
	<u> </u>	miles	Please be sure that the following inform	
M	Taxes (Also see Page 4 for Fed and State esti		-	nation is documented
	2022 State income tax-balance paid in	2023 when	on each donation receipt:	and address
ĺ	your state return was filed	\$	(1) Organization name (2) Date donated	and address
	Real estate tax on personal residence	\$		1. 1
	Personal property taxes (autos, boats)	\$	(3) Fair market value (d	,
	Sales tax - boats, homes, aircraft	\$	<ul><li>(4) General description</li><li>(5) Estimate of original</li></ul>	
	Sales tax - vehicles	\$	Total of all non-cash donations	\$
		·	Total of all non-cash donations	⊅
$\mathbf{S}$	Adoption expenses	\$	SC college prepayment	
			150 conege prepayment	
	· ·	*		\$
ION	Date adoption finalized	\$	investment program	\$ \$
CTION	Date adoption finalized Alimony paid	\$	investment program Teacher (K-12) (classroom expenses)	\$ \$ ) \$
UCTION	Date adoption finalized Alimony paid Name	\$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T	
DUCTION	Date adoption finalized Alimony paid Name Soc Sec #	\$\$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty	
DEDUCTIONS	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses	\$\$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T	
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty	
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty	
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees ( <b>Form 1098-T</b> Early withdrawal penalty Other deductions:	) \$ \$ \$ \$
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty Other deductions: 	) \$ \$ \$ \$ butions:
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS#	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty Other deductions: 	) \$ \$ \$ butions: Family
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# Traditional IRA 2023 contributions:	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees ( <b>Form 1098-T</b> Early withdrawal penalty Other deductions: 	) \$ \$ \$ \$ butions: Family \$
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# Traditional IRA 2023 contributions: Taxpayer	\$ \$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty Other deductions: 	) \$ \$ \$ butions: Family \$ \$
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# <b>Traditional</b> IRA 2023 contributions: Taxpayer Spouse	\$ \$	investment program Teacher (K-12) (classroom expenses) College tuition and fees ( <b>Form 1098-T</b> Early withdrawal penalty Other deductions: 	) \$ \$ \$ \$ butions: Family \$ \$ \$ \$ \$
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# <b>Traditional</b> IRA 2023 contributions: Taxpayer Spouse <b>Roth</b> IRA 2023 contributions:	\$ \$ \$	<ul> <li>investment program</li> <li>Teacher (K-12) (classroom expenses)</li> <li>College tuition and fees (Form 1098-T</li> <li>Early withdrawal penalty</li> <li>Other deductions:</li> <li>Health Savings Accounts (HSA) contril</li> <li>Coverage: Self-only</li> <li>Employer contributions</li> <li>Your contributions (after-tax only)</li> <li>Value of HSA at 12/31/23</li> <li># Mos covered by a high-deductible h</li> </ul>	) \$ \$ \$ butions: Family \$ \$ \$ \$ \$ \$ bealth plan
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# <b>Traditional</b> IRA 2023 contributions: Taxpayer Spouse <b>Roth</b> IRA 2023 contributions: Taxpayer	\$ \$ \$	<ul> <li>investment program</li> <li>Teacher (K-12) (classroom expenses)</li> <li>College tuition and fees (Form 1098-T</li> <li>Early withdrawal penalty</li> <li>Other deductions:</li> <li>Health Savings Accounts (HSA) contril</li> <li>Coverage:Self-only</li> <li>Employer contributions</li> <li>Your contributions (after-tax only)</li> <li>Value of HSA at 12/31/23</li> <li># Mos covered by a high-deductible h</li> <li>Please include Forms 1098-SA and 54</li> </ul>	) \$ \$ \$ \$ butions: Family \$
MISC CREDITS AND DEDUCTION	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# <b>Traditional</b> IRA 2023 contributions: Taxpayer Spouse <b>Roth</b> IRA 2023 contributions:	\$ \$ \$	<ul> <li>investment program</li> <li>Teacher (K-12) (classroom expenses)</li> <li>College tuition and fees (Form 1098-T</li> <li>Early withdrawal penalty</li> <li>Other deductions:</li> <li>Health Savings Accounts (HSA) contril</li> <li>Coverage: Self-only</li> <li>Employer contributions</li> <li>Your contributions (after-tax only)</li> <li>Value of HSA at 12/31/23</li> <li># Mos covered by a high-deductible h</li> </ul>	) \$ \$ \$ \$ butions: Family \$
	Date adoption finalized Alimony paid Name Soc Sec # Child care expenses Provider's name Address City, ST EIN/SS# <b>Traditional</b> IRA 2023 contributions: Taxpayer Spouse <b>Roth</b> IRA 2023 contributions: Taxpayer	\$ \$ \$	<ul> <li>investment program</li> <li>Teacher (K-12) (classroom expenses)</li> <li>College tuition and fees (Form 1098-T</li> <li>Early withdrawal penalty</li> <li>Other deductions:</li> <li>Health Savings Accounts (HSA) contril</li> <li>Coverage:Self-only</li> <li>Employer contributions</li> <li>Your contributions (after-tax only)</li> <li>Value of HSA at 12/31/23</li> <li># Mos covered by a high-deductible h</li> <li>Please include Forms 1098-SA and 54</li> </ul>	) \$ \$ \$ \$ butions: Family \$
	Date adoption finalized         Alimony paid         Name         Soc Sec #         Child care expenses         Provider's name         Address         City, ST         EIN/SS#         Traditional IRA 2023 contributions:         Taxpayer         Spouse         Roth IRA 2023 contributions:         Taxpayer         Spouse         If you purchased health insurance th         1095-A is furnished to individuals t         advance payments of the premium to		investment program Teacher (K-12) (classroom expenses) College tuition and fees (Form 1098-T Early withdrawal penalty Other deductions: 	<pre>) \$\$ \$\$ \$\$ butions: Family \$\$ \$\$ \$\$ health plan \$\$ 1) 31, 2024. Form redit on the return with ation in your tax return</pre>

		Other income:	
BR M	Alimony received	\$ 	\$
ΗQ			\$
	Jury duty	\$	\$
			·

Use this section to report home office deductions, self-employment business income and expenses (Schedule C), rental property income and expenses (Schedule E), and farm income and expenses (Schedule F). See the next page regarding 1099 filing requirements and questions for certain payments that you made and are claiming as a deduction below.

and questions for certain pa	ayments that you made and	are claiming as a deduction	n below.	
Description of Rental				
Property/Business/Farm				
or Home office				
	\$	\$	\$	\$
INCOME				
EXPENSES				
Advertising				
Interest expense				
Legal & accounting				
Cleaning/maintenance				
Commissions paid				
Insurance (excluding				
life and health)				
Interest expense				
Management fees				
Office expense				
Postage, shipping				
Real estate taxes				
Rent: Equipment				
Office space				
Repairs & maintenance				
Supplies				<u> </u>
Property tax/licenses				
Travel				
Telephone				
Meals & entertainment				
Utilities				
Other:				
Vehicle expense ONLY:				
<ul> <li>Prop tax</li> </ul>				
• Tolls, rentals				
<ul> <li>Gas, repairs, Insur, etc.</li> </ul>				
_				
• Mileage:	•1	•1	miles	*1
Business: Jan-Dec	miles	miles		miles
Personal miles	miles	miles		miles
Total miles	miles	miles		miles
I I		1		

Sales/Use Tax and Fuel Tax Credit (SC) Total purchases from mail orders, inter-		\$
Total sales tax charged and paid to SC a	and other states on the above purchases	\$
SC Fuel Tax Credit: The last year for thi	s tax credit was 2022.	

SC Sales/Use Fax and Fuel Tax Credit Please list below all estimated payments made for the tax year 2023, including estimated payments for 2023 made in 2024.

$\mathbf{S}$	Federal estimated tax paym	ents:	State estimated tax payme	ents:
	<u>Date paid</u>	<u>Amount</u>	<u>Date paid</u>	<u>Amount</u>
		\$		\$
		\$		\$
		\$		\$
PA		\$		\$
		\$		\$
		·		

NOTE: If you have a foreign bank, investment or retirement account, please let us know. There are severe penalties for not reporting foreign accounts.

Please provide any other additional information here:

## If you are self-employed, own rental property, or operate a farm you MUST answer the following:

Yes \_\_\_\_No Did you make any payments that would require you to file Form(s) 1099? Yes \_\_\_\_No If "Yes" to the above question, did you or will you file all required Form(s) 1099?

**1099 Filing Requirements** – Forms 1099-MISC/Form-NEC are required to be issued if <u>ALL</u> of the following are true:

1. You paid non-corporate service providers \$600 or more during 2023 AND

- 2. The payments are for business (not personal) <u>AND</u>
- 3. You are self-employed (Schedule C), own rental property (Schedule E), or operate a farm (Schedule F)

Examples of the above payments include: professional fees paid to an attorney or an accountant; payments to independent contractors for janitorial services, information technology consulting, web design, and repairs; and rent paid to a landlord (just to name a few).

Either visit the IRS website or call our office for assistance in completing these forms. The penalties for not filing these forms can range from \$30-\$250 per form.

Standard mileage rates (cents per mile):				REMINDERS:	
	<u>2023</u>	<u>202</u>	<u>4</u>	•	If you have children who will be filing tax returns,
Business	65.5	67.0	)		please be sure they do <u>not</u> claim themselves if they are not eligible to do so. If the parents are eligible to
Moving	22.0	21.0	)		claim their child, then the child generally cannot
Medical	22.0	21.0	)		claim themselves.
Charitable	14.0	14.0	)	•	For electronic filing purposes, please provide us a copy
Retirement contri	ibution limi	ts (subiect to	provisions):		of a check, not a deposit slip, even if your bank account
		2023	2024		has not changed since last year.
Roth/Traditional	IR A	<u>6,500</u>	7,000	•	PLEASE REMEMBER to include all IRS documents
		,	,		with the tax information that you submit to our office.
IRA catch-up con	ntributions	1,000	1,000		This includes forms W-2, 1099s, 1098 (mortgage inter-
SIMPLE plans		15,500	16,000		est paid), 1098-T (College tuition and fees paid), health
SIMPLE catch-u	up contrib.	3,500	3,500		insurance form 1095-A, and HSA forms 1098-SA and
(Catch-up provision	ns are for indiv	iduals age 50 and	d older)		5498-SA.

NFORMATIONAL DATA

ESTIMATED TA