

**HOOVER AND ASSOCIATES ORGANIZER
TAX YEAR 2023**

Name: _____
SS#: _____
Birth Date: _____
Address: _____
Occupation: _____
Cell Phone: _____

Spouse: _____
SS#: _____
Birth Date: _____
Occupation: _____
Cell Phone: _____

Are you single and intend to claim Head of Household? Yes or No **Please be prepared to prove that you provided more than half of the cost of keeping up a home for the tax year, for a qualifying person.**

Dependents Name	Birth Date	Social Security Number
_____	_____	_____
_____	_____	_____
_____	_____	_____

You must have a social security number for each dependent.

ESTIMATE PAYMENTS: Amount paid/ Date

Federal: \$ _____ /4/15/22 \$ _____ /6/15/22 \$ _____ /9/15/22 \$ _____ /1/16/23
Iowa: \$ _____ /4/30/22 \$ _____ /6/30/22 \$ _____ /9/30/22 \$ _____ /1/31/23

INTEREST & DIVIDEND INCOME: Please bring all 1099's with you.

OTHER INCOME:

Gambling Or Lottery Winnings - **(Bring 1099 or W-2G and stmt of winning/losses with you.)**

Unemployment Income: _____ **(Bring 1099-G)**

Social Security Income: **BRING FORM WITH PINK BOX**

Taxpayer _____ Spouse _____

Other Miscellaneous Income _____

Did you have income from sale of stocks or bonds, rents, business, farm, IRA or pension distribution?
_____ **(Bring 1099)**

Did you make a contribution to your IRA plan (not through work)? _____
Roth or Traditional

CHILD DAY CARE:

Name: _____ Address _____ SS# _____ Amt: _____

Name: _____ Address _____ SS# _____ Amt: _____

You must have name, address, and social security number. (EIN number if it is a business.)

PERSONAL ITEMIZED DEDUCTIONS:

MEDICAL

Health Ins **(Do not include Medicare or pretax ins)** _____
Drugs _____
Doctors _____
Dentist _____
Eye Care & Contacts _____
Other Medical _____
Medical Mileage _____
Long Term Care(h) _____ (w) _____
Supplemental Health Ins _____

CONTRIBUTIONS

You must have a receipt for your contribution to be a qualified charitable contribution.
Check _____
Bring stmts from charity Clothing & Etc. _____
Bring stmts from charity

INTEREST

Mortgage Interest _____ **(Bring 1098)**
Mortgage Interest _____ **(not on 1098)**
Address _____
TIN _____
Points Paid _____

TAXES

Property _____
Auto License _____

COLLEGE:

Interest Paid on Student Loans
_____ **(bring 1098-E)**

K-12th

School Supplies _____
Amount paid for tuition, textbooks and extracurricular activities for your child at school (Must be K-12)

Did you contribute to or withdraw money from a 529 plan to pay school expenses? _____

Tuition Paid for Higher Education _____ **(bring 1098-T and itemization)**

Amounts paid for textbooks and required supplies _____

Amount paid for room & board _____