

Attach Form(s) W-2 - Wages, Salaries, Tips and Other Compensation	
Employer Name	2023 Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRA's, etc.	
1099-R Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 - Social Security/Railroad Benefits	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB- 1099	_____	_____
Medicare B Premiums withheld	_____	_____
Medicare C Premiums withheld	_____	_____
Medicare D Premiums withheld	_____	_____

Attach Form(s) 1099-MISC - Miscellaneous Income and 1099-NEC		
1099-MISC Payer Name and 1099-NEC Payer Name (under which business/occupation is this under?)		2023 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

Attach Form(s) 1099-INT - Interest Income	
1099-INT Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV - Dividend Income	
1099-DIV Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S - Sales of Stocks, Bonds, Real Estate, etc.
 Attach all stock sale transaction information, including initial cost information

Other Government Forms to attach:
 Form(s) 1099-G - Certain Government Payments, Sched K-1's - Partnership, S-Corp, Trust or Estate Income,
 Form(s) W-2G - Gambling or Lottery Winnings, Form(s) 1099Q - Payments from Qual Education Programs

Other Income:
 Alimony (divorce agreements prior to Jan 01, 2019), jury duty, unreported tips, disability income, etc.
 Business, rentals, farms: Attach income and expenses for any business, rental, or farm you own.
 Include a list of all new equipment acquired this year, including date of purchase and cost.

	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2023	_____	_____
Roth IRA contributions made for 2023	_____	_____
If any distributions/recharacterizations, what is the year-end fair market value? SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

Medical and Dental Expenses (retain receipts for your records)	2023 Amount
Prescription medications	_____
Health Insurance Premiums	_____
Doctors, Dentists, etc.	_____
Hospitals, clinics, etc.	_____
Eyeglasses and contact lenses	_____
Parking and tolls for medical purposes	_____
Miles driven for medical purposes (\$0.16 per mile)	_____
Long-Term care premiums	_____
Other medical and dental expenses:	_____

Taxes	2023 Amount
Real Estate taxes paid on principal residence	_____
Real Estate taxes paid on additional homes or land	_____
Auto license registration fees based on the value of the vehicle	_____
Other personal property taxes	_____

Interest Expenses	2023 Amount
Home mortgage interest paid - Attach Form(s) 1098.	
Lender's Name	_____

<i>Points paid on loan to buy, build or improve main house</i>	
Lender's Name	_____

Cash/Check/Credit Contributions (any additional, please attach)	2023 Amount
_____	_____
_____	_____
_____	_____

Noncash Charitable Contributions
 Attach all receipts with details listing the following information: Donee name, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Rents Paid	2023 Amount
How much rent did you pay?	\$ _____
In what state was the rent paid? _____	

Miscellaneous Deductions (2018 - 2025 individuals cannot claim)

OTHER HELPFUL HINTS:

- Your doctor and pharmacy can print you a convenient summary of the year's medical expenses paid (please request)
- NJ Unemployment benefit tax information (Form 1099-G) MUST be downloaded from the NJ website

		Yes	No
1 Did you receive an Economic Impact (Stimulus) Payment? If yes, how much did you receive? \$ _____		<input type="checkbox"/>	<input type="checkbox"/>
2 Did a lender cancel any of your debt in 2023 (Attach any Forms 1099-A or 1099-C)		<input type="checkbox"/>	<input type="checkbox"/>
3 Did you make energy efficient improvements to your home or purchase an energy-saving property during 2023? If yes, please attach details.		<input type="checkbox"/>	<input type="checkbox"/>
4 Did you purchase a motor vehicle or boat during 2023? If yes, attach documentation showing sale tax paid.		<input type="checkbox"/>	<input type="checkbox"/>
5 Did you purchase a hybrid or electric vehicle in 2023? If yes, enter year, make, model, and date purchased:		<input type="checkbox"/>	<input type="checkbox"/>
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6 Did you donate a vehicle in 2023? If yes, attach Form 1098C		<input type="checkbox"/>	<input type="checkbox"/>
7 (for quest 4-6) What was the sales tax rate in your locality in 2023? % State ID: _____		<input type="checkbox"/>	<input type="checkbox"/>
8 Did your marital status change during 2023? If yes, please explain _____		<input type="checkbox"/>	<input type="checkbox"/>
9 Were you or your spouse permanently and totally disabled in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have dependents who must file?		<input type="checkbox"/>	<input type="checkbox"/>
11 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200		<input type="checkbox"/>	<input type="checkbox"/>
12 Did you provide over half the support for any other person during 2023?		<input type="checkbox"/>	<input type="checkbox"/>
13 Did you incur adoption expenses during 2023?		<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? If IRA recharacterized, what was the FMV at year-end? _____		<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive any disability payments in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
16 Did you receive tip income not reported to your employer?		<input type="checkbox"/>	<input type="checkbox"/>
17 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? a If yes , attach closing or escrow statements, 1099-C or 1099-A Forms. b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?		<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any casualty or theft losses during 2023?		<input type="checkbox"/>	<input type="checkbox"/>
19 Did you incur any non-business bad debts?		<input type="checkbox"/>	<input type="checkbox"/>
20 Did you pay any individual for domestic services in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
21 Did you take a retirement account distribution related to the corona virus or a natural disaster?		<input type="checkbox"/>	<input type="checkbox"/>
22 Did you buy or sell stock or bonds in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
23 Did you use the proceeds from Series EE or I US savings bonds purchased after 1989 to pay for higher education expenses?		<input type="checkbox"/>	<input type="checkbox"/>
24 Did you incur any moving expenses? If yes , attach details.		<input type="checkbox"/>	<input type="checkbox"/>
25 Did you receive any income not included in any of the previous pages so far? If yes , please attach.		<input type="checkbox"/>	<input type="checkbox"/>
26 Do you expect your income and deductions in 2023 to be the same as 2023? If no , attach explanation of changes expected.		<input type="checkbox"/>	<input type="checkbox"/>
27 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.		<input type="checkbox"/>	<input type="checkbox"/>
28 At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		<input type="checkbox"/>	<input type="checkbox"/>
29 a. Did you obtain a Paycheck Protection Program (PPP) Loan? b. If yes, has any portion of that loan been forgiven?		<input type="checkbox"/>	<input type="checkbox"/>
30 (Prior Jan 1, 2019) If you paid any alimony, enter recipient's SSN: _____ Alimony paid: \$ _____ Date of divorce? _____ Name of ex-spouse _____		<input type="checkbox"/>	<input type="checkbox"/>
31 Enter your state residence : Taxpayer _____ Spouse _____		<input type="checkbox"/>	<input type="checkbox"/>
32 Did you apply for a Homestead Rebate from NJ in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
33 Did you apply for a Property Tax Reimbursement from NJ in 2023?		<input type="checkbox"/>	<input type="checkbox"/>
34 Did you make untaxed internet purchases in 2023? (helpful tip: you can download your Amazon purchase history) If yes, please provide a total amount \$ _____ <i>(For your records, retain a schedule of: the description, date of purchase, purchase price (incl shipping))</i>		<input type="checkbox"/>	<input type="checkbox"/>
35 Do you have any foreign accounts?		<input type="checkbox"/>	<input type="checkbox"/>
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Electronic Filing and Direct Deposit of Refund			
If your tax return is eligible for Electronic Filing, would you like to file electronically?		<input type="checkbox"/>	<input type="checkbox"/>
If you receive a refund, would you like direct deposit (if available)?		<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide a voided check (not a deposit slip) if your bank account has changed.			
Bank name and type of account? _____ Checking _____ Savings _____			
Account Number _____ Routing Number _____			
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Estimated Tax Paid			
Federal: Dates _____ Amounts _____			
State: Dates _____ Amounts _____			
Local: Dates _____ Amounts _____			
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Additional Information			
Enter any additional information here and attach any documents.			

