



212 TAX / JLD TAX INDIVIDUAL ORGANIZER

How did you hear about 212 Tax or JLD Tax & Accounting LLC?

Are you eligible to be claimed as a dependent on another tax return? **YES / NO**

	TAXPAYER INFO:	SPOUSE (if applicable):	Are you filing as:
Last Name			Single
First Name			Married Joint
Middle Name			Need to File Married Filing Separate (we can discuss)
Social Security #			Head of Household
Date of Birth			NAMES MUST MATCH SOCIAL SECURITY CARDS EXACTLY
Occupation			
Blind or Disabled?	YES/NO	YES/NO	
Are you a veteran?	YES/NO	YES/NO	
Cell Phone #			
Home Phone #			
Home Address			
Apt #			
City			
State			
Zip			
E-mail address			

Have you been a victim of identity theft ?	YES/NO
If Yes, please provide your IRS 6-digit PIN # :	

Did you change your state residency in 2023?	YES/NO
If yes, when did you move and from what state?	

DEPENDENTS INFO:

First Name			
Middle Name			
Last Name			
Social Security #			
Date of Birth			
Relationship			
Full Time Student?	YES/NO	YES/NO	YES/NO

If you would like direct deposit of your refund or your taxes paid by ACH, please provide:			
Bank Routing #		Bank Account #	
Checking or Savings?		Bank Name	

Were you notified by the IRS, State and/or City of any change to any prior tax return?	YES/NO
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If you are not coming back in to pick up your tax returns, how do you want them sent to you?

Online Portal	E-mail	Messenger - \$ 25	Priority Mail - \$ 10
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Please provide us with originals or copies of all W-2s, 1099s, 1098s, last year's tax returns (if you are a NEW client) and any other paperwork that affects your taxes.

ALL INFORMATION ALWAYS KEPT CONFIDENTIAL

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Driver's License Detail

Taxpayer:

Issuing State	
License Number	
Issue Date	
Expiration Date	
NY Document #*	

Spouse:

Issuing State	
License Number	
Issue Date	
Expiration Date	
NY Document #*	

State Identification Card Detail

Taxpayer:

Issuing State	
License Number	
Issue Date	
Expiration Date	
NY Document #*	

Spouse:

Issuing State	
License Number	
Issue Date	
Expiration Date	
NY Document #*	

By completing this tax organizer and signing below, you certify that all of the information entered onto this tax organizer (all sheets & tabs) is true and complete to the best of your knowledge and belief. We will not audit or verify the data you submit, although we may ask you to clarify it and furnish us with additional information. You are authorizing this information to be used in the preparation of your income tax returns by 212 Tax / JLD Tax & Accounting LLC.

You are also authorizing 212 Tax / JLD Tax & Accounting LLC to mail and e-mail you information and newsletters. If you would like to be removed from our mailing list at anytime please send an e-mail to jldonenfeld@jldtax.com or call us at 201-604-2432.

TAXPAYER SIGNATURE:

DATE:

SPOUSE SIGNATURE:

DATE:

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YES	NO

- 1) Did you incur any child care expenses? YES NO
 If yes, please include **Caregiver/Daycare address, tax ID or SS#, and how much paid** for **EACH** child.
- 2) Did you pay college tuition for you, your spouse and/or a dependent? YES NO
 If yes, please provide form **1098-T** and **how much you paid out-of-pocket** for books & school supplies.
- 3) If you are a **New Jersey resident**, are any of your dependents in college? YES NO
 If yes, **how many** of your dependents are in college?
- 4) Did you have any student loan interest? YES NO
 If yes, please provide **how much** and Form **1098-E**.
- 5) Did you contribute to a qualified State Tuition Plan (i.e. 529 plan)? YES NO
 If yes, please provide the **amount contributed** and to which **State Plan**:
- 6) Did you pay any alimony? YES NO
 If yes, please provide the **amount paid**, the **recipient's social security number**, and the **date of divorce**.
- 7) Do you own your primary residence? YES NO
 If yes, please provide how much you paid in **real estate taxes** and **mortgage interest** and please provide **Form 1098**.
 Real Estate Taxes Paid: Mortgage Interest (Form 1098)
- 8) If you were NOT a full time resident of NY State, did you own/rent a home in NY State? YES NO
- 9) Did you live in New Jersey or New York and pay rent? YES NO
 If yes, please specify the state and provide the total amount paid in 2023.
- 10) Did you contribute to a Traditional or Roth IRA or other retirement plan? YES NO
 If yes, please provide the **amounts contributed** and **type of plan**: (don't include 401-K from work)
Type of plan: Traditional I.R.A. / Roth I.R.A. / Other **Amount Contributed:**
- 11) Did you make any charitable contributions to qualified organizations? YES NO
 If yes, please provide the **name of the organization contributed to** and the **amounts contributed**.
Please provide us with receipts (copies are fine) for any donation valued at \$ 250 or above.
- 12) Did you issue any household employees a W-2? If yes, please provide the W-2. YES NO
- 13) Did you make any quarterly estimated tax payments? (please do not include withholdings from W-2) YES NO
 If yes, please the **dates**, **amounts paid**, and **who was paid (i.e., IRS or State, please specify which state)**.

	I.R.S.	New Jersey	N.Y. State	N.Y. City	Other State	Other State
April 15th 2023						
June 15th 2023						
Sept. 15th 2023						
Jan. 15th 2024						

- 14) Did you make any gifts of more than \$ 15,000 to any one US person? YES NO
- 15) Did you suffer any casualty loss in a federally declared disaster zone? YES NO
- 16) Did your total medical expenses during the year exceed 2% of your income? YES NO
 If yes, please provide the total amount of expenses.
- 17) Did you make contributions to your HSA account and/or take distributions from it? YES NO
 If yes, please provide us with your **5498-SA and/or 1099-SA form(s)**.
- 18) Did you receive any reimbursements for deductions (such as medical, moving expenses, etc.) claimed in prior years? YES NO
 If yes, please provide the amount.
- 19) Did all members of your household have full year health insurance in 2023? YES NO
 If you had part year insurance, please **provide the dates**. Please provide **Form 1095-A or 1095-B or 1095-C**.

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	YES	NO
1) What was your immigration status last year and if it has changed, what is it now? <i>(Non US Citizens/Non Green card holders may have to answer a few additional questions)</i>		
2) Did you receive any wages? Please provide any Form W-2s received.		
3) Did you pay any long-term care insurance premiums? (Form 1099-LTC)		
4) Did you receive any interest or dividend income? Please provide any Form 1099 INT / 1099 DIV / 1099B / 1099 Consolidated received.		
5) Did you sell any stock or exercise or sell employee stock options? (whether you made money or not!) If yes, please provide the details. (Type of options plan?)		
6) At any time during the year, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency, CRYPTO and/or N.F.Ts? If yes, please provide a break down of your sales including the cost basis .		
7) Did you receive any income from rental real estate in 2023? If yes, please fill out and return page 6 of the organizer (RENTAL REAL ESTATE).		
8) Did you receive any self employment income in 2023 (1099 NEC, 1099 MISC, 1099K)? If yes, please fill out and return page 7 of the organizer (SELF EMPLOYED).		
9) Do you receive any K1s? (1065, 1120s, 1041) If yes, please provide the K1s .		
10) Did you take any retirement distributions (IRA, 401K, Keogh, pension funds)? If yes, please provide Form 1099-R. Did you have any retirement distribution taken COVID-19 related in 2020? If yes, did you have tax liability extended over the 3 years?		
11) Did you receive any social security benefits in 2023? If yes, please provide Form 1099-SSA .		
12) Did you sell any real estate (Personal Home or investments)? If issued, please provide Form 1099-S .		
13) Did you receive unemployment income? If yes, please provide Form 1099-G (this can be downloaded from the state's website).		
14) Did you purchase any goods that you did not pay sales tax on? If yes, please provide the amounts.		
15) Did you have any funds in foreign bank accounts? If yes, please provide the maximum balance in the account during 2023 in USD. If over \$10,000, please provide the name and address of the bank. Please also provide the name of the account holder, account number and account type (e.g., bank, securities, etc.)		
16) Are you a signer on a foreign (non US) account?		
17) Did any one foreign (non US) person give you \$100,000 or more?		
18) Do you own any part of any foreign (non US) company and/or entity?		
20) Did you earn any income outside of the U.S.? If yes, please specify the currency , the type of income, the amount earned , and the amount of taxes paid (if any).		
21) Did you receive alimony income? If yes, please provide the amount of alimony received and the date of divorce :		
22) Did you receive gambling winnings? If yes, please provide the amount of gambling winnings and Form W-2G :		
23) Did you receive cancellation of debt? If yes, please provide the amount of cancellation of debt income and Form 1099-C :		
24) Did you receive jury duty income? If yes, please provide the amount of jury duty income received and Form 1099-G or 1099-MISC , if received.		
25) Did you receive any other income in 2023? REMEMBER: ALL WORLDWIDE INCOME MUST BE REPORTED ON US TAX RETURNS		

RENTAL REAL ESTATE

	Rental Property # 1	Rental Property # 2
Complete Address:		
Date Purchased:		
Purchase Price:		
Value of Building(s)/Land: NOT FMV (Check your Property Tax Statement)		
# of Days Rented Out:		
# of Days of Personal Use:		
Rental Income Received:		
2023 Capital Improvements:		
EXPENSES:		
Auto MILES driven (# of miles driven)		
Advertising & Marketing		
Association dues		
Travel		
Cleaning & Maintenance		
Commissions		
Insurance		
Legal & Professional fees		
Licenses & Permits		
Management fees		
Mortgage interest on form 1098		
Other interest		
Repairs (not capital improvements)		
Supplies		
Pest control		
Property Taxes		
Utilities		
Yard work & Snow removal		
Other _____		
Other _____		

Repairs can be related to electrical, heating/air conditioning, painting, plumbing & roofing

Utilities can consist of electricity, heat, telephone, trash removal, water/sewer, internet/TV

Please be as specific as possible when classifying expenses

SELF EMPLOYMENT (OWN BUSINESS)

THIS SHEET IS FOR Taxpayers who are self-employed or SINGLE MEMBER LLCs.

Business Name:	Type of Business:	Tax ID (EIN #):
EXPENSES (fill in only what applies to your business) :		
Advertising & Marketing	Did you make any payments that would require you to file a 1099? (payments of \$600 or more annually to Individuals and LLCs)	YES/NO
Bank Fees & Credit Card Merchant Fees	If YES, did you issue all required 1099s ?	YES/NO
Business Gifts (up to \$ 25 per client)	Did you pay health insurance premiums ?	YES/NO
Business MEALS	If YES, how much ?	\$ -
Commissions paid		
Contract Labor	INCOME	
Cost of Goods Sold (we can help with this)	Income on 1099-MISC or 1099-NEC	
Dues, Subscriptions & Memberships	Income on 1099-K (from credit card processors)	
Employee Benefits (specify type please)	Other SELF-EMPLOYED income (not on 1099s)	
Equipment Rent	TOTAL GROSS INCOME:	\$ -
Insurance (except for health, specify type)	Have you made purchases of the following items:	
Interest paid (specify type please)	COMPUTERS, EQUIPMENT, PHONES, SOFTWARE & TABLETS	YES/NO
Internet (not home office)	If yes, please provide the following details:	
Legal & Professional Fees	Item Description	Date Purchased
Licenses & Permits	Price	
Office Expenses		
Office Rent (not home office)		
Office Supplies		
Other taxes (non payroll related)		
Payroll fees / services (Paychex, ADP, etc.)	HOME OFFICE EXPENSES:	
Payroll Taxes	Square Footage of Home Office EXCLUSIVELY used for business:	
Printing, copying, signs, etc.	Total Square Footage of Home:	
Repairs and Maintenance (not home office)	Total Rent Paid:	
Salaries paid to employees (provide W2's)	Total Insurance:	
Shipping, Postage & Messengers	Total Internet:	
Small tools & equipment (under \$ 500 each)	Total Repairs & Maintenance:	
Tax Preparation and Accounting	Total Telephone & Fax:	
Taxis & Ubers	Total Utilities:	
Telephone (Landline & Cellular monthly bills)	BUSINESS VEHICLE EXPENSES:	
Trade Publications	Make, Model, and Year of Car:	
Travel	Total miles driven during the year:	
Uniforms & Dry Cleaning of uniforms	Business miles (do not include commuting miles)	
Utilities (not home office)	Gas:	
Vehicle Rentals	Insurance & Registration:	
Miscellaneous expenses	Parking:	
Retirement Plan Contributions	Cleaning, Repairs, Maintenance:	
Additional Comments	Tolls:	
	Is the vehicle leased / financed / paid-off?	
	If financed/paid-off , please provide:	
	Date of Purchase	
	Purchase Price	
	Annual Car Loan Interest	
	If leased , please provide monthly lease payment:	
	If leased , please provide start date of lease :	
	If leased , please provide Fair Market Value :	
	Do you have another vehicle for personal use?	YES/NO