Progressive Tax Service - Tax Year 2023 1803 Smizer Station Road, Fenton, MO 63026 (636) 225-3708

Note: items in gray that **have not changed** since last year do not need to be completed.

Yo	ur Name	e:				SSN (your	rs)		
Spouse Name:				SSN (spou	SSN (spouse)				
Street Address				Date of Bi	Date of Birth (yours)				
City, State & ZIP					Date of Birth (spouse)				
	mary Te		16				r STL city):		
	-	-	Address			country (o	TOTE CITY).		
_	ouse's E								
			's License #			State:	Issue date:	Exp date:	
			License #			State:	Issue date:	Exp date:	
На	ve you ı	receive	d any notice from th	e IRS or state rev	enue department	in 2023? Y	N		
Ma	arital Sta	atus at	12/31/2023	Single	Married	Separat	ed Widow(er)		
Dic	d you di	vorce o	or separate during 20	23? Y N					
Cai	n you be	e claim	ed as a dependent b	y another taxpay	er, such as a pare	nt? Y N			
De	penden	nts: Do	not list yourself or yo	our spouse. List d	ependent childre	n or other depen	dents:	1	
							Months lived in		
Na	me:			Birth Date:	SSN:	Relationship:	home 2023	College	student
								Υ	N
								Υ	N
			Idren have unearned		1		ent income)? Y N	Y	N
Do			ldren have a disabilit e a different taxpaye	•	n a child listed ab	ove as their depe	endent for tax year 2023	YN	
Do Do	you and	ticipate ns for	e a different taxpaye ALL Taxpayers	r will seek to clair - We need the	ese questions a	answered	endent for tax year 2023	Y N	
Do Do	you and	ticipate ns for	ALL Taxpayers s to both taxpayer ar	r will seek to clair - We need the nd spouse; if unsu	ese questions a	answered			
Do Do	you and uestion te "You	ticipate ns for refers N	ALL Taxpayers s to both taxpayer ar If you are due a refu	r will seek to clair - We need the nd spouse; if unsu und, would you lil	ese questions a re, please enter ' ke direct deposit	answered '?" ' (Enter details be	elow.) Please circle SAMI		
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	Υ	N	Did you make any contributions to a §529 plan in 2023?	? or distributions?					
	Υ	N	N Did you purchase or sell a home during the year? If yes, add'l information including closing stmts are needed.						
a)	Υ	N							
Home	Υ	N	Did you refinance a mortgage or take a home equity loan? <i>If yes, please provide closing statement.</i>						
ឣ	Υ	N	Did you use mortgage loan proceeds for purposes other						
	Υ	N	Did you make any new energy-efficient improvements to						
	Y	N							
SS	,	IN	Do you own a business or an interest in a partnership, corporation, LLC, farming activity or other venture? Please call our office if you need a self employed income worksheet.						
ne	Υ	N	Did you receive income from a sharing/gig economy activity such as AirBnB, Uber or Shipt?						
Business	Y	N		mployed business, gambling, legal settlements, disability,					
Ш П	ī	IN							
		NI.	or any other income? Please provide details (our office may have worksheet available for some income types).						
	Υ	N	Did you, or will you, contribute any money to an IRA for						
			Taxpayer Amount: Traditional \$	Roth IRA \$					
rs.		N.	Spouse Amount: Traditional \$,					
Investments	Y Y	N	Did you rollover any amounts from a retirement accoun						
ţ		N	Did you sell or transfer any stock or sell rental or investr	ment property in 2023?					
Ves	Y Y	N	Did you receive any income from an installment sale?	- 20222					
=		N	Did you have any investments that became worthless in						
	Υ	N	Did you(a) receive (as an award, reward, or payment for						
	Υ	N.I	otherwise dispose of any digital assets (crypto-currence	,					
		N	Were you granted, or did you exercise, any employee st						
_	Y	N	Did you/will you make a contribution to an HSA for 2023						
Other	Y Y	N	Did you pay any interest on a loan for a boat or RV that						
	Y	N N	Did you make any charitable contributions in 2023? If so						
	1	IN	Did you pay sales taxes on a major purchase in 2023, su	acti as a verificie, boat of KV:					
	ome Ple	ease p	rovide ALL W-2s and 1099s (of ALL kinds - INT, DIV, B, S, C	Composite, R. SSA, RRB, MISC, NEC, G etc.)					
Inc				,, -,,					
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	Please W-2s: Interes Tax Exe Other I State T Unemp	empt li	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): nterest: e: und \$	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips \$					
	Please W-2s: Interes Other I State T Unemp Social S	empt I	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): nterest: und \$ nt Compensation \$	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips \$					
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	Please W-2s: Interes Other I State T Unemp Social S	empt I	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): nterest: und \$ nt Compensation \$ y (taxpayer) \$	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips \$					
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Adj	Please W-2s: Interes Other I State T Unemp Social S Social S iustmer	empt li cax Refoloyme Securit Securit or exp	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): c: und \$ nt Compensation \$ y (taxpayer) \$ y (spouse) \$ enses. Classroom expenses of teachers, counselors and p	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips \$ Other income description: \$ sprincipals. Maximum \$300 each \$					
Adj	Please W-2s: Interes Other I State T Unemp Social S Social S iustmer Educat: Health	empt Income Securit Securit or expressions	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): e: und	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips Other income description: \$ principals. Maximum \$300 each or thru payroll deduction) ** \$					
Adj	Please W-2s: Interes Tax Exe Other I State T Unemp Social S Social S iustmer Educat: Health Self em	empt Income ax Reference Securit Securit or expressions apployed	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): 1-2s P-INT): 1-3 1-4	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips \$ Other income description: \$ sprincipals. Maximum \$300 each \$ or thru payroll deduction) ** \$					
Adj	Please W-2s: Interes Other I State T Unemp Social S Social S iustmer Educat Health Self em Self em	empt I	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): 1-2s P-INT): 1-3 1-4	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips Other income description: \$ principals. Maximum \$300 each or thru payroll deduction) ** \$ \$ \$					
Adj	Please W-2s: Interes Tax Exe Other I State T Unemp Social S Social S iustmer Educat: Health Self em Penalty	empt II Income Securit Securit or exp saving ployee ployee or on ea	P-INT): P-INT): Part of each issuer and provide all tax documents: P-INT): P-INT): P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-INT: P-IN	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips Other income description: \$ principals. Maximum \$300 each or thru payroll deduction) ** \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$					
Adj	Please W-2s: Interes Tax Exe Other I State T Unemp Social S Social S iustmer Educat Health Self em Penalty IRA dec	empt li cax Refinoloyme Securit for exp saving aployed ployed y on ea	Number of 1099s mes of each issuer and provide all tax documents: 9-INT): 1-2s P-INT): 1-3 1-4	Pensions and Retirement Accounts (1099-R): Dividends (1099DIV): Unreported tips Other income description: \$ principals. Maximum \$300 each or thru payroll deduction) ** \$ \$ \$					

^{**} Note: some contributions for 2023 may be made in 2024.

Itemized Deductions

Deductions must exceed \$13,850 (Single or married filing separate), \$20,800 (head of household) or \$27,700 (married/joint) to be a tax benefit.

octors & Dentists rescription meds and insulin	J1	Medical transportation	SI
· ·	\$	Hearing aids & dentures	\$
ospitals & nursing homes	Ś	Eyeglasses & contacts	\$
lealth insurance premiums	\$	Long term care ins - self	\$
other:	\$	Long term care ins - spouse	\$
Medical miles enter # of miles		@ \$0.22/mile	\$
axes Paid			
tate estimated tax paid 2023	\$	Personal property tax	\$
eal estate tax - primary home	\$	Foreign tax paid	\$
eal estate tax - other	\$	Other	\$
ales tax paid car/boat/RV	\$		
Mortgage Interest Paid Please provide all F	Forms 1098 or lender infor	rmation including EIN and address of lien	holder.
lain home	\$	Points	\$
econd home	Ś	Equity loan	\$
Vere proceeds of equity loan used to purch	hase or substantially impr		Y N
The second of equity four used to pulce	J. Japotantiany impi		1 11
	\$		\$
	\$		\$
	\$		\$
	\$		\$
lon-cash (items donated) contributions over	১ er \$500 require additiona	I reporting on IRS Form 8283.	۶ <u>ا</u>
otal non-cash donations	\$	Please provide receipts if over \$5	00.
nated Tax Payments			
ederal		State	
pplied from <u>prior year</u>	\$	Applied from prio <u>r year</u>	\$
tr 1 date:	\$	Qtr 1 date:	\$
tr 2 date:	\$	Qtr 2 date:	\$
tr 3 date:	\$	Qtr 3 date:	\$
tr 4 date:	\$	Qtr 4 date:	\$
Preparation Checklist			

	Mileage figures for any automobile expenses claimed, including tot	otal, commuting and business mileage.					
	Income and deductions categorized (worksheets available) for business or rental activities.						
	Details of estimated tax payments made, if any. Completed Individual Income Tax Organizer/aka Interview Sheet. Please note, if you choose not to complete the						
	organizer, all taxpayers must at least answer the yes/no questions of	under the heading "Questions for All Taxpayers."					
Г	Please note, before your completed returns can be delivere						
_	you (both, if married) must sign Form 8879 and our engage	·					
		•					
	office to sign, please discuss options with your preparer or	one of our staff members.					
Cert	fication/Signatures						
	I/We certify that the information provided for our tax preparation s	service is true and complete to the best of					
	my/our knowledge.						
	Taxpayer	Date					
		2.4					
	Spouse	Date					