

BROUSSARD FINANCIAL, LLC
2646 APPIAN WAY STE 27
PINOLE, CA 94564
Tel: 707-400-8743 Fax: 707-230-5375
WWW.BROUSSARDFINANCIAL.COM

Dear
Tax Clients,

The 2023 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2023 income tax return. Please complete the organizer section as appropriate and provide supporting documentation where necessary.

Please provide us with the following additional information:

- A copy of your 2023 tax return if not prepared by this office.
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S Corporations, etc.)
- Form (s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stocks, bond or other investments transactions.
- Closing statements pertaining to real estate transactions, Purchased or Sold
- All other supporting documents (schedules, checkbooks, etc.)

Thank you for your help in completion of the Tax Organizer. Please contact us if you need further assistance (707)400-8743.

Sincerely,



Gwen Hale-Broussard
Owner

2023	1040	US	Client Information
<p>Broussard Financial, LLC. Telephone 707-400-8743 Fax Number 707-230-5375 E-Mail Gwen@broussardfinancial.com</p> <p>This tax organizer will assist you in gathering information necessary for the preparation of your 2023 tax return. Please add, change, or delete information as appropriate.</p>			
CLIENT INFORMATION			
Filing Status	Filing Status (table below)..... 1=married filing separate and lived with spouse..... Year spouse died, if qualifying widow(er).....		
Taxpayer	First Name and Initial.....		
	Last Name.....		
	Title/Suffix.....		
	Social Security Number.....		
	Occupation.....		
	Date of Birth (m/d/y).....		
	Date of Death (m/d/y)..... 1=blind.....		
Spouse	First Name and Initial.....		
	Last Name.....		
	Title/Suffix.....		
	Social Security Number.....		
	Occupation.....		
	Date of Birth (m/d/y).....		
	Date of Death (m/d/y)..... 1=blind.....		
Address	In care of.....		
	Street Address.....		
	Apartment number.....		
	City.....		
	State.....		
	ZIP code.....		
Foreign Address	Region.....		
	Postal Code.....		
	Country.....		
Taxpayer Contact Information	Home Phone.....		
	Work Phone & Ext.....		
	Daytime Phone.....		
	Mobile Phone.....		
	Fax Number..... E-Mail Address.....		
Spouse Contact Information	Home Phone.....		
	Work Phone & Ext.....		
	Daytime Phone.....		
	Mobile Phone.....		
	Fax Number..... E-Mail Address.....		

Filing Status
1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = qualifying widow(er)

2023	1040	US	Dependents
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Please add, change or delete information for 2023

DEPENDENTS

	Dependent 1	Dependent 2
First Name.....		
Last Name.....		
Title/Suffix.....		
Date of Birth (m/d/y).....		
Social Security Number.....		
Relationship.....		
Months Lived at home.....		
Type of Dependent (See table below)....		
Earned Income credit (See Table below).		
Claimed by 1=Taxpayer, 2=Spouse.....		
	Dependent	Dependent
First Name.....		
Last Name.....		
Title/Suffix.....		
Date of Birth (m/d/y).....		
Social Security Number.....		
Relationship.....		
Months Lived at home.....		
Type of Dependent (See table below)....		
Earned Income credit (See Table below).		
Claimed by 1=Taxpayer, 2=Spouse.....		
	Dependent	Dependent
First Name.....		
Last Name.....		
Title/Suffix.....		
Date of Birth (m/d/y).....		
Social Security Number.....		
Relationship.....		
Months Lived at home.....		
Type of Dependent (See table below)....		
Earned Income credit (See Table below).		
Claimed by 1=Taxpayer, 2=Spouse.....		

Type of Dependent

- 1 = Child living w/taxpayer
- 2 = Child not living w/taxpayer
- 3 = Dependent other than child
- 4 = Head of household only
not a dependent.
- 5 = Earned income credit only
not a dependent.

Earned Income Credit

- 1 = When applicable (default)
- 2 = Student age 19 to 23
- 3 = Disabled
- 4 = Force
- 5 = Suppress

2023	1040	US	Tax Information For Year 2023
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Please add, change or delete information for 2023.

Mortgage Info	Home 1	Home 2
1st Mortgage Lender		
Mortgage Interest Paid		
2nd Mortgage Lender		
2nd Mortgage Interest Paid		
Home Insurance Paid For Year 2023		
Property Taxes Paid For Year 2023		
Home Association Dues Paid		
Mortgage Refinance Yes/No		
Mortgage Refinance Fees		
Auto Information	Auto 1	Auto 2
Make/Model		
Registration Amount		
New Car Purchased Yes/No		
New Car Interest Amount/Registration		
Lease/Owned		
Business Expense/Personal Expense		
Dated New Car Purchased		
Home Expenses	Home 1	Home 2
Home Repairs		
Losses/Vandalism		
Date Of Loss		
Alarm Services Yes/No		
Purchased or Sold Home In Year 2023 Y/N		
Date of Purchased		
Purchase Price		
Expenses		
Commission		

Business Expenses:

2023	1040	US	Deductions
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Please add, change or delete information for 2023

Deductions

	Person 1	Person 2
Medical.....		
Dental.....		
Legal.....		
Church Contribution.....		
Unemployment.....		
Family Leave.....		
Car registration.....		
Any Vand/Theft (See table below)....		
Personal Property Boat/ Job Uniforms/Union Dues		

	Person 1	Person 2
Investment Fees.....		
School/Books.....		
Gamblings Lost/Wins.....		
State Refund Amount.....		
Relationship.....		
Job Train/Seeeking.....		
Sales Taxes Deduction		

	Person 1	Person 2
MISC DEDUCTIONS		

ADDITIONAL NOTES: