



# O'Rourke Tax Service, Inc. Tax Itemizer (For Tax Year 2023)

Please Return the Completed Questionnaire at Your Appointment or When Dropping Off Your Return, Answering All Questions Applicable to You

Taxpayer Information			
Name	SSN	DOB	Occupation
Taxpayer			
Spouse			
Phone: ( ) -	Type: <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Work		Contact Email Address:
Street Address:		City:	State: Zip:
Were you legally married as of December 31 <sup>st</sup> , 2023?			<input type="checkbox"/> Yes <input type="checkbox"/> No
Can you be claimed as a dependent on someone else's return?			<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you purchase or sell a home in 2023? (If yes - provide the settlement statements)			<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have any out of state or online purchases where WI sales tax was not paid?			<input type="checkbox"/> Yes <input type="checkbox"/> No

Dependents					
Name	SSN	DOB	Relationship	Mos. in Home	FT College Student?
					<input type="checkbox"/> (Check if Yes)
					<input type="checkbox"/> (Check if Yes)
					<input type="checkbox"/> (Check if Yes)
					<input type="checkbox"/> (Check if Yes)

Did Any Dependent Above Have:  Investment Income Over \$2300?  Childcare Expenses? (Bring Provider Statement)

Income			
Did You/Spouse Have	Yes	No	Documentation to Provide
Wages	<input type="checkbox"/>	<input type="checkbox"/>	Form W2
Pension/401k/IRA Withdrawal	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-R
Social Security Benefits	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-SSA
Interest Income	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-INT
Dividend Income	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-DIV
Stock or Property Sales	<input type="checkbox"/>	<input type="checkbox"/>	Stock Sales-Form 1099-B Property-Purchase and Sale Date/Price
Unemployment Income	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-G
Gambling Winnings	<input type="checkbox"/>	<input type="checkbox"/>	Gross Winnings (& Form W2-G, if issued)
Alimony Received/Paid (If Divorced Before 2019)	<input type="checkbox"/>	<input type="checkbox"/>	Received (\$ . ) Paid (\$ . )
Debt (Consumer or Mortgage) Forgiven?	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-C or 1099-A
Other Income (Jury Duty, Unreported Tips, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	Describe and Provide Amount:
Self-Employment Income	<input type="checkbox"/>	<input type="checkbox"/>	See Our Business Tax Itemizer, Available at www.orourketax.com
Rental Income	<input type="checkbox"/>	<input type="checkbox"/>	

Estimated Tax Payments				
Due Date	Federal		State	
	Date Paid	Amount	Date Paid	Amount
4/18/23	/ /	\$	/ /	\$
6/15/23	/ /	\$	/ /	\$
9/15/23	/ /	\$	/ /	\$
1/16/24	/ /	\$	/ /	\$

IRA Contributions and Conversions		
	Taxpayer	Spouse
Traditional IRA Contributions	\$	\$
Roth IRA Contributions	\$	\$
Did You Initiate a Qualified Charitable Distribution (QCD) from a Traditional IRA?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you Convert a Traditional IRA to Roth IRA?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No



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## Education and Education Expenses

K-12 Educator Expenses	Unreimbursed Classroom Expenses: \$ _____ Hours Worked During Year: _____
Student Loan Interest	Amount Paid By: You: \$ _____ Spouse: \$ _____ (Provide 1098-E)
Higher Education Expenses for You, Spouse, or Dependents	Tuition: \$ _____ (Provide 1098-T) Books/Supplies: \$ _____ Room & Board: \$ _____ Did You Withdraw from an Education Savings Account (ESA) or 529 Account? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes – Provide 1099-Q
WI Private School	Private K-12 Tuition: \$ _____ (Provide Documentation from School & Grade of Student(s))
WI College Savings	Provide Documentation Showing Wisconsin Exempt College Fund Contributions

## Health Insurance & Health Savings Account (HSA),

Did you obtain Insurance through a Health Insurance Exchange? (If yes, we <b>MUST</b> have form 1095-A)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you maintain an HSA during 2023? If yes, fill out following two lines:	<input type="checkbox"/> Yes <input type="checkbox"/> No
HSA Contributions Made <u>Outside</u> of an Employer's Payroll (Provide Form 5498)	\$ _____
HSA Distributions made for Qualified Medical Expenses (Provide Form 1099-SA)	\$ _____

## Unreimbursed Medical Expenses

Health Insurance ( <b>NOT</b> through Employer)	\$ _____	Medicare Insurance Premiums	\$ _____
Long Term Care Insurance	\$ _____	Medicare Supplement Insurance	\$ _____
Prescriptions	\$ _____	Doctors	\$ _____
Hearing Aids/Batteries	\$ _____	Hospital	\$ _____
Eyeglasses/Contacts	\$ _____	Nursing Home/Assisted Living	\$ _____
Medical Miles Driven		Other Medical Expenses	\$ _____

## Housing Information

If You Rented Residence	Rent Paid (Rent Included Heat Utility) \$ _____		
	Rent Paid (Rent Excluded Heat Utility) \$ _____		
	<b>Note: If you can claim WI Homestead Credit, Please Provide Rent Certificate Signed by Landlord</b>		
If You Owned Residence	Taxes Paid in 2023 (Provide Receipts)	Primary Residence: \$ _____	Other Properties: \$ _____
	Mortgage Interest Paid* (Provide 1098)	Primary Residence: \$ _____	Other Properties: \$ _____
	<i>*Home Equity Interest is no longer deductible, unless it was used for home improvements/purchases. Please provide details of mortgage types, balances, and usage.</i>		

## Charitable Contributions

Charitable Miles Driven		*Must be substantiated by Bank Records or a Written Confirmation
Cash/Other Monetary Contributions*	\$ _____	**Provide itemized donation receipts if non-cash donations exceed \$500. Taxpayers are responsible for valuing non-cash donations.
Noncash Charitable Contributions**	\$ _____	

## Clean Energy Expenses

If you purchased any of the following high energy efficiency property or clean energy producing property, you may qualify for a tax credit. Please provide receipts and energy star ratings of the following expenditures.

### Energy Efficient Home Improvements

Exterior Doors	\$ _____	Exterior Windows/Skylights	\$ _____
Insulation Materials	\$ _____	Home Energy Audits	\$ _____
Central Air	\$ _____	Furnaces/Hot Water Boilers	\$ _____
Biomass Stoves/Boilers	\$ _____	Other	\$ _____

### Clean Energy Property

Solar Panels	\$ _____	Solar Water Heaters	\$ _____
Fuel Cell	\$ _____	Wind Turbines	\$ _____
Geothermal Heat Pump	\$ _____	Battery Storage Technology	\$ _____

### Clean Vehicles

If you purchased a new or used electric vehicle for personal use from a dealership, you may qualify for a tax credit. Please provide documentation from the purchase of the vehicle.