



E.A. BUCK

ACCOUNTING & TAX SERVICES

HAWAII

Honolulu

55 Merchant St., #2100
Honolulu, HI 96813

Kahului

33 Lono St., #310
Kahului, HI 96732

Kapolei

1001 Kamokila Blvd., #136
Kapolei, HI 96707

Aina Haina

850 W. Hind Dr., #102
Honolulu, HI 96821

COLORADO

DTC

4600 S. Syracuse St., #650
Denver, CO 80237

Happy New Year! Now is the time to start planning, organizing, and preparing your tax data for your 2023 income tax return. We have attached our updated tax organizer below that will assist you in gathering your tax information.

Once you have your tax documents ready, you may either:

1. Upload them through our [secure online portal](#)
2. Mail to our Honolulu office at: 55 Merchant St., #2100, Honolulu, HI 96813
3. Or you may drop them off at either our [Honolulu](#), [Aina Haina](#), [Kapolei](#) or [Kahului](#) office. Office hours are generally 8:00 a.m. to 4:00 p.m., Monday through Friday. Kapolei and Kahului office hours vary, so please call to confirm before dropping off.

Please **DO NOT staple, attach indexes/tabs, or insert dividers** on your tax documents as we scan each document. This will ensure quick and efficient processing of your tax return. Please note that your tax documents might not be returned as originally organized.

Please turn in your information before **March 09, 2024**, and our tax associates will help you to file before the initial April 15, 2024, deadline. Tax documents received between **March 10 and March 31, 2024**, will automatically be put on extension. We will assist you in calculating your extension payment (if any) based on the information provided. Tax documents received *after* **April 1, 2024**, will be extended with a zero payment due and E.A. Buck Accounting & Tax Services will not be responsible for any underpayment penalties or interest.

In order to continue providing you with our services, we have established a simple guideline for our new 2024 pricing structure and below are the service levels **:

- **Standard Tax Returns – Starts at \$330**
Service can include: W-2s, Interest, Dividends, 1099-Rs
- **Moderate Tax Returns – Starts at \$550**
Service can include: Simple Business / Rentals, Basic Schedule C, Basic Schedule E, Basic 1120Ss, Basic 1065s, Stock Sales
- **Complex Tax Returns – Starts at \$825**
Services can include: Complete Business / Rentals, 1031 Exchanges, Multiple K-1s, Complex Schedule C, Complete Schedule E, Stock Options, Day Traders, Complex 1120s, Complex 1065s, 1041 Trust Tax Returns, 990 Non-Profit Tax Returns

** State Returns other than Hawaii will be charged an additional \$50 per state.

I truly appreciate having you as a client and if there are any questions, please feel free to call us. Looking forward to working with you soon!

Kevin Nitta

Tax Director

E.A. Buck Accounting & Tax Services

888.210.6567 | [EABUCKTAXES.COM](#) | **COMPREHENSIVE TAX SERVICES**

Tax Preparation | Tax Resolution | Payroll | Bookkeeping | Tax Planning



2023 Personal Income Tax Return Data

Cut off day to submit tax documents to file before April 15, 2024 is **March 9, 2024.**

NAMES:

Self _____ Social Security No. _____ Date of Birth _____

Spouse _____ Social Security No. _____ Date of Birth _____

OCCUPATION:

Self _____ Phone _____ Email _____

Spouse _____ Phone _____ Email _____

ADDRESS: Please list your current mailing address

Street _____ City _____ State _____ Zip _____

Your marital status as of 12-31-22:

☐ Single ☐ Married ☐ Head of Household ☐ Married Filing Separate

1. Did you have any transactions involving virtual currency (i.e. Bitcoin)? ☐ Yes ☐ No

If Yes, please provide a statement of your transactions

2. Did you own an interest in any FOREIGN financial assets in 2023? ☐ Yes ☐ No

If Yes, are you filing your own FinCen or FBAR forms? ☐ Yes ☐ No

If you have a tax refund and want it directly deposited, please provide a voided check.

(Only if we do not already have your bank account already on file from previous years)

Do you want your tax liability to be paid by your bank account? ☐ Yes ☐ No

DEPENDENTS ALLOWED TO BE CLAIMED FOR TAX YEAR 2023:

Full Name	Date of Birth	Social Security No.	Relationship	Months in Home	Student Y/N

SALARIES & COMMISSIONS (FORM W-2 or 1099-NEC):

Don't forget to include your W-2 or 1099-NEC forms for salaries and commissions!

Employer	Gross	Federal Tax	State Tax
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

QUARTERLY ESTIMATED TAX PAYMENTS:

	1st Qtr.: Apr. 18, 2023	2nd Qtr.: Jun. 15, 2023	3rd Qtr.: Sep. 15, 2023	4th Qtr.: Jan. 16, 2024
Federal Tax	\$	\$	\$	\$
State Tax	\$	\$	\$	\$

INTEREST YOU EARNED (1099-INT) / Taxpayer/Spouse/Joint (Owner):

Don't forget to include your 1099 forms for interest and dividends!

Received From	H / W / J	Amount	Non-taxable?
		\$	
		\$	
		\$	

DIVIDENDS YOU EARNED (1099-DIV) / Taxpayer/Spouse/Joint (Owner):

Don't forget to include your 1099 forms for interest and dividends!

Received From	H / W / J	Gross Amount	Capital Gains	Non-taxable?
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

CAPITAL GAINS AND LOSSES (1099-B):

Item Sold	Date Sold	Date Acq	Selling Price	Cost	Gain (Loss)
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$

RETIREMENT INCOME (1099-R):

Name	Amount
	\$
	\$
	\$
	\$

SOCIAL SECURITY:

	Amount
Taxpayer	\$
Spouse	\$
Other	\$

IRA CONTRIBUTIONS FOR 2023 (Personal IRA):

	Self	Spouse
Traditional IRA	\$	\$
ROTH IRA	\$	\$

SCHEDULE K-1 (Partnerships / S-Corporations / Trusts):

Please list below and attach all K-1s to the organizer

UNEMPLOYMENT INCOME:

	Amount
Taxpayer	\$
Spouse	\$

BUSINESS IRA CONTRIBUTIONS FOR 2023:

	Self	Spouse
SEP	\$	\$
Solo 401k	\$	\$

Itemized Deductions

MEDICAL EXPENSES PAID BY YOU (Out of Pocket Expenses):

Subject to 7.5% of your Adjusted Gross Income

Medical Insurance Premiums	\$ _____	Eye Glasses	\$ _____
Prescription Drugs	\$ _____	Lab Fees	\$ _____
Other Medical Lodging	\$ _____	Long-Term Care Ins.	\$ _____
Insurance Reimb. on Above Exp's	\$ _____	Other (list)	\$ _____

TAXES:

Real Estate Tax (personal residence)	\$ _____	Other Real Estate Tax	\$ _____
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INTEREST PAID (Principal Residence Only. Not Rentals):

*Home Equity is only deductible if used to buy, build, or renovate your home

Home Mortgage	\$ _____	Closing Points on New Home Purchase or Refinancing	\$ _____
Home Equity Interest	\$ _____	Mortgage Insurance Premiums	\$ _____

CONTRIBUTIONS (List Organizations):

Paid To: Cash Contributions	Amount	Paid To: Non-Cash Contributions	Amount
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____

MISCELLANEOUS DEDUCTIONS (Not deductible for Federal but still deductible in the State of Hawaii):

Tax Preparation	\$ _____	Safe Deposit Box	\$ _____
Work Uniforms	\$ _____	Union and Professional	\$ _____
Work Tools	\$ _____	Telephone Used for Business	\$ _____
IRA Maintenance Fee	\$ _____	Prof. Books and Magazines	\$ _____
Books (job related)	\$ _____	Student Loan Interest	\$ _____
Tuition (job related)	\$ _____	Investment Expenses	\$ _____
Teaching Expenses	\$ _____	Other	\$ _____

CHILD CARE (Baby Sitter, Preschool, Afterschool Care (A+, Kama`aina Kids)):

Does NOT include K-12 schooling

Name of Provider	Address	Amount Paid	Fed ID or SS#	General Excise # (Only if the provider's location is HI)
		\$ _____		
		\$ _____		
		\$ _____		
		\$ _____		

Rental or Business Income Worksheet

Sch. E Or Sch. C	Rental Property or Business #1	Rental Property or Business #2
Description and address of property or business		
GROSS RENTS / REVENUE	\$	\$

EXPENSES:

Advertising / Promotions	\$	\$
Automobile Expense	\$	\$
Maintenance Fees	\$	\$
Commissions	\$	\$
Dues and Subscriptions	\$	\$
Insurance	\$	\$
Legal & Professional	\$	\$
Meals	\$	\$
Mortgage Interest	\$	\$
Property Management	\$	\$
Repairs	\$	\$
Rent Paid	\$	\$
Improvements	\$	\$
Office Expenses	\$	\$
Outside Services	\$	\$
Supplies	\$	\$
Real Property Taxes	\$	\$
General Excise Taxes	\$	\$
Utilities	\$	\$
Telephone	\$	\$
Travel	\$	\$
Association Dues	\$	
Other	\$	
TOTAL EXPENSES	\$	\$

What is the rental percentage of the property in 2023? _____ % _____ %

Did you issue 1099-NEC in 2023? ☐ Yes ☐ No

FIXED ASSETS (Please list any major fixed assets purchased in 2023):

Description	Amount	Date Purchased
	\$	
	\$	
	\$	
	\$	

BUSINESS USE OF PERSONAL VEHICLE:

1. Type and Model of Vehicle _____
2. Date First Used for Business _____
3. Original Cost (Price paid) \$ _____
4. Total Miles Driven in 2023 _____
5. Business Miles Driven in 2023 _____
6. Personal Miles Driven in 2023 _____
7. Parking Fees Paid \$ _____
8. Cost of Gas, Oil, Repairs, & Maintenance \$ _____

HOME OFFICE INFORMATION:

1. Total Sq. Ft. of Entire Home _____
2. Total Sq. Ft. of Home Office _____
3. Home Office Expenses (utilities, internet, etc)
 _____ \$
 _____ \$
 _____ \$

(Safe Harbor = \$5 x H.O. sq. ft. up to 300 sq. ft.)

OTHER INFORMATION:

1. SOLAR (PV) put in service in 2023?

2. Purchase an ELECTRIC VEHICLE in 2023?

3. Do you have any EDUCATION expenses?
 Please provide Form 1098-T from the college.
