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2025
TAX ORGANIZER

Taxpayer Information

Last name ..... A new client
First name ..... _____
Middle Initial..... ____ Suffix..... ____
Social security number..... _____
Occupation ..... _____
Work phone ..... _____ Ext ... _____
Cell phone..... _____
E-mail address..... _____
Date of birth..... _____
Address ..... _____
City ..... _____
Home phone..... _____

Spouse Information

Last name..... _____
First name ..... _____
Middle Initial..... ____ Suffix..... ____
Social security number ..... _____
Occupation..... _____
Work phone..... _____ Ext ... _____
Cell phone ..... _____
E-mail address..... _____
Date of birth ..... _____
Apartment number..... _____
State..... ____ ZIP Code..... _____
Fax number ..... _____

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2025 qualified student loan interest..... _____

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation

Employer Name	2024 Amount

Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2024 Amount

Attach Form(s) SSA-1099 — Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		
Medicare C premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC — Miscellaneous Income, 1099-NEC, and 1099-K

1099-MISC, 1099-NEC, and 1099-K Payer Name

Attach Form(s) 1099-INT — Interest Income

1099-INT Payer Name	2024 Amount

Attach Form(s) 1099-DIV — Dividend Income

1099-DIV Payer Name	2024 Amount

Attach Form(s) 1099-B, 1099-S — Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G — Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2025		
Roth IRA contributions made for 2025		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses

	2025 Amount	2024 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		

Taxes

	2025 Amount	2024 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid – Attach Form(s) 1098.

Lender's Name	2025 Amount	2024 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2025 Amount

Cash/Check/Credit Contributions

	2025 Amount	2024 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2025 Amount	2024 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

		Yes	No
1	Did a lender cancel any of your debt in 2025? (Attach any Forms 1099-A or 1099-C)	☐	☐
2	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2025? If **yes,** please attach details	☐	☐
3	Did you purchase a motor vehicle or boat during 2025? If **yes,** attach documentation showing sales tax paid.	☐	☐
4	Did you purchase a hybrid or electric vehicle in 2025? If **yes,** enter year, make, model, and date purchased: _____	☐	☐
5	Did you pay qualified passenger vehicle loan interest in 2025? If **yes,** attach documentation showing interest paid.	☐	☐
6	Did you donate a vehicle in 2025? If **yes,** attach Form 1098C	☐	☐
7	What was the sales tax rate in your locality in 2025? _____ % State ID _____		
8	Did your marital status change during 2025? If **yes,** explain: _____	☐	☐
9	Were you or your spouse permanently and totally disabled in 2025?	☐	☐
10	Do you have dependents who must file?	☐	☐
11	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,700?	☐	☐
12	Did you provide over half the support for any other person during 2025?	☐	☐
13	Did you incur adoption expenses during 2025?	☐	☐
14	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
15	Did you receive any disability payments in 2025?	☐	☐
16	Did you receive tip income **not** reported to your employer?	☐	☐
17a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2025? If **yes,** attach closing or escrow statements, 1099-C or 1099-A forms	☐	☐
b	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
18	Did you incur any casualty or theft losses during 2025?	☐	☐
19	Did you incur any non-business bad debts?	☐	☐
20	Did you pay any individual for domestic services in 2025?	☐	☐
21	Did you take a retirement account distribution related to a natural disaster?	☐	☐
22	Did you buy or sell any stocks or bonds in 2025?	☐	☐
23	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
24	Did you incur any moving expenses? If **yes,** attach details	☐	☐
25	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
26	Do you expect your income and deductions in 2026 to be the same as 2025? If **no,** attach explanation of changes expected.	☐	☐
27	Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	☐	☐
28	At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐	☐
29	If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
30	Enter your state of residence **Taxpayer** _____ **Spouse** _____		
31a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language? _____		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☒	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

If **yes,** please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	**Amount**	**Date**	**Amount**	**ID**	**Date**	**Amount**	**ID**

Additional Information (Enter any additional information here and attach any documents.)