

2024

TAX ORGANIZER

PLEASE USE THIS FORM TO ASSIST WITH GATHERING OF INFORMATION FOR YOUR 2024 TAX RETURN. WHERE NOTED, PLEASE CHECK OFF EACH ITEM AS YOU GET THEM.

This section required for drop off

Taxpayer Name Spouse Name
Taxpayer DOB Spouse DOB
Taxpayer SSN Spouse SSN

Table with 3 columns: Mailing Address, Phone Number, Can Text. Includes Y/N options for Can Text.

Dependents (Check here if you are a dependent on someone else's return.)

Table with 4 columns: Dependent Name, Dependent DOB, Dependent SSN, School Attending (If 18 y/o or older)

Marketplace Insurance anytime in 2024: Yes (Provide 1095-A) No

Any one in my family (me, spouse, or dependents) have an Identity Protection PIN ‡. Yes No

Bank information, housing

Form with two columns: Left column asks about refund preference (Mailed Check vs Direct Deposit) and account info. Right column asks about housing (Rent vs Own vs Neither).

Income – Money you receive (Check off each box as you receive these forms.)

Table with 6 columns for income sources: Salary/Wage, Social Security, Non-Employee, Cancellation of Debt, Interest Rec., Pension/401K, Unemployment, Card Payments, Dividends Rec., Misc. Income, Gambling Income, Other.

Adjustments – Money that adds to or takes from your income. (Check off each box as you receive these forms)

Table with 4 columns for adjustments: Alimony Received or Spent, S/C-Corp, Partnership profit/loss, K-12 Education Expenses, Stock Transactions, Sale of House, HSA Contribution/Distribution.

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* If you check 1099-MISC, 1099-NEC, or 1099-K, and the money is received for purposes other than tribal payments, salesperson commissions, etc., please contact our office for further instructions.

† If you sell your house and make a profit (Sold for more than you bought it for), a portion of the profit may be subject to income tax, unless you are eligible for the sale of your main home exclusion.

‡ If someone on your return has an identity protection PIN, the IRS will mail you notice CP01A with tax year 2024 in December 2023. You must provide this notice to us to prepare your return.

Itemized Deductions – Subtractions from your income (Check all that apply.)

Description	✓	Description	✓	Description	✓
Medical Insurance Premium		Doctor / Specialist office charges		Prescription / OTC Medicine	
Medical Lab Work		Hospital Care		Miles Driven to / from hospital	
Property Tax Bill		Mortgage Interest (1098)		Gifts to Charities / Non-Profits	

Other: _____

Tax Credits – Money that the government gives out to encourage certain behaviors. (Check all that apply)

Description	✓
I paid a certified babysitter or childcare facility for care of my child / children. (Must have SSN or EFIN of babysitter / facility, provide breakdown of care for each child)	
I paid college tuition in 2024, and it is within the first 4 years of my college education. (Provide 1098-T)	
I paid college tuition in 2024, and it is NOT within the first 4 years of my college education. (Provide 1098-T)	
I invested money into an IRA, Roth IRA, or 401K pension plan over and above what my employer does. (Provide form 5498)	
I made improvements to my home that either allow me to use clean energy, or improve my energy efficiency (E.g., Insulation, windows / doors, boilers, heat pumps. Must be Energy Star Certified, provide receipts of qualifying expenses)	
I am in the process of, or did adopt one or more children in 2024. (Contact Office for instructions).	
I purchased an electric / hybrid car for personal use in 2024 new. (Provide buyer's contract).	

Miscellaneous Information

<p>I had paid quarterly estimates 1040-ES in 2024 __ Yes __ No</p> <p>\$ _____ Q1 Due 4/15/24</p> <p>\$ _____ Q2 Due 6/15/24</p> <p>\$ _____ Q3 Due 9/15/24</p> <p>\$ _____ Q4 Due 1/15/25</p> <p>I requested that my refund of last year gets applied to this year's return. __ Yes __ No</p>	<p>If you know that you may owe a large amount of money next year, do you want estimates to offload that tax due across four quarters? (Estimate tax due in 2026, and make four payments in 2025 against it) __ Yes __ No</p> <p>If you know that you may owe money next year, do you want us to apply your refund this year to offset tax due next year? (Get \$0 refund this year, to lessen tax owed next year)</p>	<p>Check those that apply.</p> <p>____ I know that I am missing documents. Do not finish my return until I get them.</p> <p>____ I know that I need an extension. I am aware that by getting an extension, the failure to file penalties may be waived, however the IRS reserves the right to charge interest on amounts due if I do not pay my taxes by 4/15/25.</p>
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Other Events:

<p>____ I got married.</p> <p>____ I got divorced between 1/1/23 and 12/31/23.</p>	<p>____ Both taxpayer and spouse have died. I am filing their last tax return on their behalf. §</p>
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§ Not only will we need the name, date of birth, and SSN of taxpayer and spouse, we will also need the name, DOB, SSN, address, and phone number for the executor. You will need to provide documents from the probate court indicating that you are responsible for filing this return.