2025

TAX ORGANIZER

PLEASE USE THIS FORM TO ASSIST WITH GATHERING OF INFORMATION FOR YOUR 2025 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**	____________

Mailing Address	Phone Number	Can Text
		Y / N
		Y / N
		Y / N

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

Dependent Name	Dependent DOB	Dependent SSN	School Attending (If 18 y/o or older)

Marketplace Insurance anytime in 2025: ____ Yes (Provide 1095-A) ____ No

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

Bank information, housing

If you receive a refund, how do you want it sent?	Did you either rent, or own your own home?
_______ Mailed Check (May wait 4 – 6 months)	___ Rent
	I pay $_______ rent per ___ Month ___ Year
_______ Direct Deposit (2 – 3 weeks, fill below)	If you got homestead credit last year, make sure to bring a signed rent certificate this year.
Routing # (9 digits): ______________________	
Account #: ______________________________	
Is this a ___ Savings or ___ Checking account.	___ Own I pay $______ In property tax.
(Alternately, attach a voided check).	___ Neither (E.g., Live with parents)

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

Description	✓	Description	✓	Description	✓
Salary / Wage (W-2)		Interest Rec. (1099-INT)		Dividends Rec. (1099-DIV)	
Social Security (1099-SSA)		Pension / 401K (1099-R)		Misc. Income(1099-MISC) *	
Non-Employee (1099-NEC) *		Unemployment (1099-G)		Gambling Income (W-2G)	
Cancellation of Debt (1099-C)		Card Payments (1099-K) *		Other:	

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

Description	✓	Description	✓
Alimony Received or Spent		Stock Transactions (1099-B)	
S / C-Corp, Partnership profit / loss (K-1)		Sale of House (Buyer's contract, 1099-S) †	
K-12 Education Expenses		HSA Contribution (5498-SA) / Distribution (1099-SA)	

OVER

* 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 2025 in December 2024. 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 2025, and it is within the first 4 years of my college education. (Provide 1098-T)	
I paid college tuition in 2025, 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 2025. (Contact Office for instructions).	
I purchased an electric car for personal use in 2025 new. (Provide buyer's contract).	

Miscellaneous Information

I had paid quarterly estimates 1040-ES in 2025 __ Yes __ No $______ Q1 Due 4/15/25 $______ Q2 Due 6/16/25 $______ Q3 Due 9/15/25 $______ Q4 Due 1/15/26 I requested that my refund of last year gets applied to this year's return. __ Yes __ No	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 2027, and make four payments in 2026 against it) ___ Yes ___ No 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)	Check those that apply. ____ I know that I am missing documents. Do not finish my return until I get them. ____ 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.

Other Events:

____ I got married. ____ I got divorced between 1/1/25 and 12/31/25.	____ Both taxpayer and spouse have died. I am filing their last tax return on their behalf. §

§ 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.